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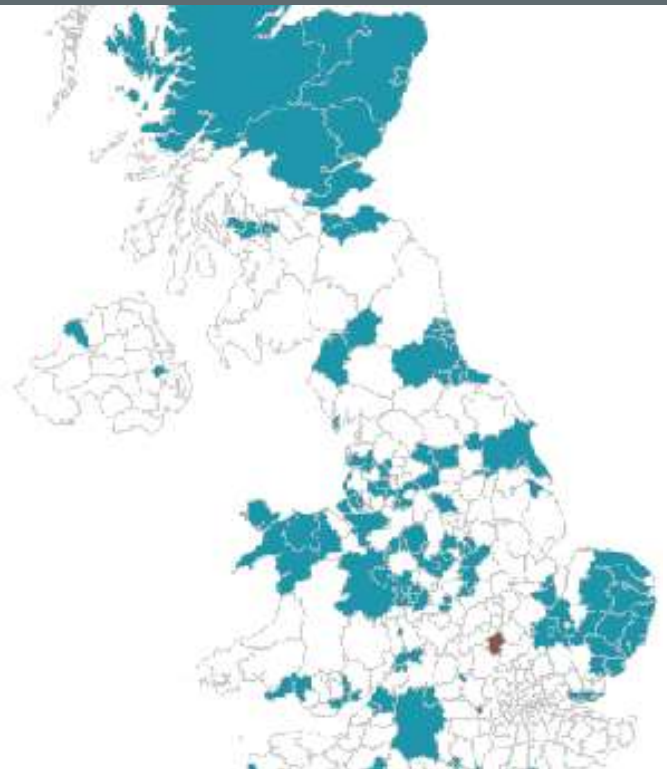
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Monopolising local news

Is there an emerging local democratic deficit in the UK due to the decline of local newspapers?

Gordon Ramsay and Martin Moore

Centre for the Study of Media, Communication and Power



May 2016

About the Centre for the Study of Media, Communication and Power

The Centre for the Study of Media, Communication and Power explores how news provision, political communication, public discourse, civic engagement and media power are changing in the digital age. We do this through rigorous empirical research, and communication of the findings of this research to inform relevant academic and public policy debates and civic society responses, in order to help promote diversity, fairness, transparency and accountability in media and communication.

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The Policy Institute at King's College London acts as a hub, linking insightful research with rapid, relevant policy analysis to stimulate debate, inform and shape policy agendas. Building on King's central London location at the heart of the global policy conversation, our vision is to enable the translation of academic research into policy and practice by facilitating engagement between academic, business and policy communities around current and future policy needs, both in the UK and globally. We combine the academic excellence of King's with the connectedness of a think tank and the professionalism of a consultancy.

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All maps used in this report were created by Lena Anayi, who also assisted with aspects of the research and data analysis that forms the core of the report

Preface

Over the last decade an increasing number of voices have raised concerns about the decline of local news provision in the UK and its impact on democracy. These voices have been challenged by those, particularly within the news industry, who claim that after a difficult period of transition local news is becoming fit for the digital age. Both claims suffer from a relative lack of systematic evidence. Without such evidence it is more difficult to justify existing policy interventions or alter them. Yet, as this study shows, to maintain the status quo holds democratic, economic and social risks.

This study, which builds on recent work by both authors, aims to begin to fill the evidence gap and, as a consequence, inform changes in public policy regarding the provision of local news and information. It is important to note that the references in this report to the decline of local newspapers refer to the quantitative decline in the number and circulation of local newspapers, and do not reflect the quality of the output or work of local journalists. This study does not include a quantitative or qualitative analysis of local newspaper content.

This report has been reviewed by two academics with expert knowledge in local news from outside King's College London, and one academic within King's College London.

March, 2016

Addendum

The fieldwork for this study ended in November 2015. Since then, the local newspaper industry has continued to see closures, redundancies, and changes of ownership at certain titles. One development, however, has significant implications for the data presented here: following the purchase of Local World by Trinity Mirror, several titles were initially to be taken over by Iliffe News and Media. They have been recorded as such in this study.

While correct at the time this report was written, in February 2016 it was reported that Trinity Mirror is to pay Iliffe not to proceed with that part of the deal, and instead to take control of those titles as well as the rest of the Local World portfolio. Therefore, the data presented in this report now slightly under-represents the level of dominance that Trinity Mirror exerts in local markets across the UK.

On 22 March 2016 Johnston Press outlined plans to sell, close or cut costs at 59 titles designated 'sub-core.' This number consists mostly of local newspapers across Scotland, England and Northern Ireland, including at least one daily title, the *Wigan Evening Post*.

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Summary

Aims of the study

This study provides data and analysis about the extent to which local news is fulfilling its democratic function in the UK, with the aim of informing future public policy in this area. Specifically, it examines the extent to which there has been a decline in the provision and plurality of local newspapers that may, it has been claimed, be leading to a democratic deficit at a local level.

The assessment is deliberately focused on the extent to which Local Authority Districts (LADs) and parliamentary constituencies are served by local newspapers, since this correlates directly with the normative functions expected of the news media (such as providing the information citizens are expected to have access to in order to vote).

Over the last decade, increasing numbers of academics, journalists, and civil society organisations have raised concerns that a decline in the number of local newspapers and in the number of local journalists, coupled with a decrease in plurality of local news providers, is leading to a reduction of alternative news sources, a concentration of ownership, the closure of titles and less reporting of public affairs – which in turn may be leading to a democratic deficit at a local level.

These claims have been challenged by others, particularly those at a senior level within the news industry. Yet, though there is disagreement about the nature of change in local news and its repercussions, there is a consensus that local news has gone – and is continuing to go – through a period of radical transition in which local newspapers have had significantly to alter their production, distribution and sources of revenue.

Context and background

There has been concern about the decline in number of local print newspapers in the UK for seven decades. Concern has increased in the last ten years.

Anxiety about the concentration of ownership in the local press is also longstanding with consolidation having persisted in fits and starts since the middle of the 20th century.

Revenues from local print display and classified advertising, that were falling prior to the advent of the web, have fallen faster since and have not been matched by the rise in revenue from digital advertising.

The dominant local news groups have made significant cuts to staff – including editorial staff – over the last decade and are continuing to reduce staff further.

Evidence from specific locations across the UK has shown that there are fewer journalists reporting from councils, courts and other public authorities, though further research is necessary to establish the extent to which this is true for the country as a whole.

Hyperlocal news sites are beginning to perform an important democratic function, but their reach and impact remains limited, and their sustainability in doubt.

Methodology

This study reviews existing academic research and reporting about the state of local news in the UK. Using original research, it recalculates the total number of local newspapers, identifies who they are owned by, and delineates the areas they serve. It then maps local papers to LADs and constituencies across the UK, based on this new data, in order to show the extent to which different areas are served by daily and weekly papers, and the level of news plurality at a local level.

The study takes, as its basis, local political boundaries within the UK, so that it can be used to better assess the extent to which local news media is performing normative democratic functions – such as informing voters about their local issues and candidates prior to an election. As a result of this approach, the report does not cover large or ‘national’ regional newspapers, such as the *Evening Standard* in London or newspapers covering Scotland, Wales or Northern Ireland as a whole. While these newspapers serve an important democratic function, serve large audiences, and sit between the national press and local newspapers, they do not provide sustained and targeted coverage of issues at the level of local democratic units. Many localities receive sporadic attention from these titles, which have large geographical areas to cover with finite resources.

The detailed LAD and constituency maps can be found later in this report and online (where they are interactive) at <http://www.localnewsmapping.uk>. The data and a complete list of newspapers can also be found online.

Key findings

The study shows that the number of local newspapers is declining, though not as fast as predicted. Local weekly newspapers still cover most of the country, but local daily coverage is absent in large parts of the UK:

- 1,112 distinct daily and weekly local newspapers were identified as circulating in the UK, as of November 2015
- Over two-thirds of LADs in the UK (271 of 406) are not served by a dedicated local daily newspaper that either reaches a significant number of households or circulates a significant number of copies in the area. These LADs contain over 56 per cent of the UK’s population.
- Local daily newspapers are almost always located in urban or metropolitan areas, leaving many rural areas (and smaller towns) with weekly print news coverage, or – where local weekly news websites publish throughout the day – the journalistic capacity of a weekly, rather than a daily, newspaper.

- Over half of Parliamentary constituencies - 330 out of 650 - are not covered by a dedicated daily local newspaper. Of those that are not covered, 206 were only reported on five times or fewer during the official 2015 general election campaign across all major UK national news outlets, meaning that these constituents are likely to have received limited independent news and information about their local candidates immediately prior to the election.

The study shows that there are high levels of dominance by single owners, including many monopoly areas:

- Four publishers – Trinity Mirror, Johnston Press, Newsquest and Tindle – account for 73 per cent of these local newspaper titles across the four nations of the UK. Archant account for a further seven per cent, while the remaining 58 publishers of one or more local newspapers account for just one-fifth of titles.
- 43 per cent of the 380 LADs in Scotland, England and Wales¹ are served by a single publisher providing one or more titles: 165 local newspaper monopolies.
- 96 per cent of LADs in Scotland, England and Wales have a dominant publisher (accounting for over 50 per cent the circulation of local papers publishing in that area); only 17 LADs do not. In 262 LADs (69 per cent) a publisher accounts for over 70 per cent of circulation figures.
- Following the October 2015 deal transferring ownership of the majority of Local World titles to Trinity Mirror, the latter company now dominates the local news market in 90 LADs across the country.
- An analysis of local newspaper website audiences in a sample of LADs shows that monopoly coverage or dominance of a single provider is often not reduced by the availability of online content. Of 20 sampled LADs with monopoly print coverage, 16 had monopolies in online local news provision. Of 20 sampled LADs with a dominant print publisher (but not a monopoly), all continue to have a dominant publisher online, and four receive monopoly provision of local online news.

Three of the four main local news groups have reported significant reductions in staff, including editorial staff, over the last five years. The issues raised by the decline in the number of local newspapers and their plurality, and the decline in the number of journalists at a local level, do not appear to be addressed by the rise in digital readership of local newspaper content. However, there is currently not enough information by which to judge the full extent or effects of this decline on the provision of local news about public affairs across the UK.

On the basis of its actions, the government does not currently appear to share the concerns raised by journalists, academics, the National Union of Journalists, parts of the trade press, the BBC and civil society groups about the decline of local newspapers and its implications for democracy. This study does not assess the content of local newspapers. Its examination of a potential democratic deficit does not, therefore, represent any criticism of the work of individual local journalists.

¹ Circulation or readership data not available for Northern Ireland. See Methodology section for details.

Policy implications

Four main policy implications emerge from this study:

1. The existing plurality framework is not ensuring ‘sufficient plurality’ of news media ownership in multiple local areas across the UK. In 165 LADs in England, Scotland and Wales a single commercial news publisher has a monopoly. The government should, as the House of Lords Communications Committee recommended in 2014, consider a major upheaval of the existing media plurality framework.
2. While there is evidence to support intervention, there is not yet enough detailed and local evidence to target specific interventions, such as the BBC’s proposal to employ 100 new local reporters.
3. Subsidies currently given to local media – which run into the hundreds of millions of pounds – are not targeted at promoting innovation, entrepreneurialism, plurality or at addressing a potential democratic deficit.
4. There is an urgent need for further research to establish the nature and extent of local news provision and inform potential policy interventions.

Introduction

On Monday 19 October 2015 the Chair of the BBC Trust, Rona Fairhead, gave a speech at the Society of Editors conference in which she claimed that ‘a democratic deficit may be starting to emerge’ at a local level in the UK:

‘Some local council meetings are going unreported. Some court reporting is starting to fall by the wayside...This thinning out of local coverage is not happening everywhere...But the picture overall is patchy. As local papers closures mount [*sic*] – 300 over the last ten years according to the *Press Gazette* – the risk of democratic deficit inevitably rises too. As a result, the media’s ability to hold to account those who wield power in local communities may be starting to decay. And this, just at the point when greater localism and more devolution is being demanded by the public and enabled by central government.’²

Shortly afterwards, the Chief Executive of Trinity Mirror, Simon Fox, was asked on an episode of Radio 4’s *Media Show* for his reaction to the BBC Chair’s claim and to the BBC proposal to help address the deficit by employing a hundred local journalists. Fox strongly rejected Fairhead’s claim:

‘Our reaction is that there isn’t a democratic deficit and that the BBC, on this occasion, are painting a picture of a problem that doesn’t exist and are wanting to move more journalists onto our areas that we have traditionally... we report on local councils, local courts.’³

These are not the only influential media figures to have contradictory views about whether there is an emerging ‘democratic deficit’ at a local level. Academic studies, industry trade journal *Press Gazette*, and the National Union of Journalists, have all presented a picture of the local press in crisis. By contrast, owners and senior managers at local media groups claim that, after a period of tough change, the local press is growing and performing well.

The only consensus appears to be that the local press, like the media generally, has gone through a period of transition unlike any in its history:

‘The “age of digital media” is witnessing innovation and radical change across all aspects of journalism, creating economic difficulties for legacy media and a frenzied search for alternative business models to fund a sustainable journalism for the future.’⁴

2 Fairhead, R., ‘BBC Trust Chairman calls on BBC and wider news sector to work together to avert a democratic deficit in local news reporting’, BBC Trust, 2015, http://www.bbc.co.uk/bbctrust/news/speeches/2015/local_news_reporting.

3 BBC Radio 4, *The Media Show*, 4 November 2015, <http://www.bbc.co.uk/programmes/b06mg9fk>.

4 Franklin, B., ‘The Future of Journalism’, *Journalism Studies*, 2014, 15:5, 481-499.

‘What we are faced with though is a very difficult period right now, the transition to digital...None of us have made the transition from print pounds to digital pennies work for us yet. It will. We believe in that and the investors believe in that. But certainly right now, and over the next couple of years, we face some very real challenges but challenges that Government can certainly help us with.’⁵

Beyond that, however, agreement is limited. Owners and senior managers focus their concerns on the welfare and sustainability of their businesses. They point to the need for investment in technology and new skills, and the need for scale to compete with transnational businesses like Facebook and Google. Media advisors Oliver and Ohlbaum have argued that ‘the UK print news sector continues to sustain a high number of national and local titles and is a world leader in plurality by international comparisons’. Referring to the industry’s business model they claim that: ‘[W]hile the model is under pressure it is not demonstrably broken.’⁶

In contrast, the National Union of Journalists, and many journalists, focus on swingeing job cuts across most major newsgroups, on the increased workload for local journalists, increasing constraints put on reporting, and on the impact on the quality of journalists’ output. A report by the Media Reform Coalition argued that ‘Concentration within some news and information markets [including local newspapers] has reached endemic levels and is undermining the quality and diversity of output on which citizens rely.’⁷

In these polarised debates about the state of the local media industry there is a risk that the perspective of the citizen may be lost. There is a danger that the degree to which different local communities are served by local news and information is relegated to a secondary concern. Ironically, the contradictory views expressed by the BBC and Trinity Mirror’s CEO are helpful. They refocus attention on the question of whether there is a democratic deficit, and if there is, whether it is growing or shrinking.

Yet it is currently difficult to answer this question definitively due to lack of comprehensive, reliable evidence. Without evidence it is difficult to make firm conclusions regarding the provision of local news across the UK – particularly at local authority and constituency level – and whether it is comprehensive enough to support an informed democracy and self-governing communities across the country. It is also difficult to appraise the need for industry-led or public policy interventions where local news provision may be insufficient or overly concentrated in the hands of one provider.

This report aims to provide part of the evidence necessary to help fill this gap. It provides the most comprehensive data publicly available to date on the number of local newspapers in the UK, their ownership, and the democratic communities they serve (in other words on a Local Authority and constituency level). It uses and supplements existing data on local newspapers from Local Media Works/JICREG and MediaTel. It then cross-references this data with information obtained via primary research, and from the Carnegie Trust, Talk about Local, and Openly Local.

5 Highfield, A., ‘Uncorrected Transcript Of Oral Evidence, Regulation Of The Press’, Culture, Media and Sport Committee, 2013, <http://www.publications.parliament.uk/pa/cm201314/cmselect/cmcumeds/uc143-i/uc14301.htm>.

6 Oliver and Ohlbaum., *UK news provision at the crossroads: The news market in the 21st Century and the likely implications for the BBC’s role*, a report for the News Media Association, 2015, http://www.newsmediauk.org/write/MediaUploads/PDFper cent20Docs/OandO_NMA_-_UK_news_provision_at_the_crossroads.pdf.

7 Media Reform Coalition, *The elephant in the room: a survey of media ownership and plurality in the United Kingdom*, 2014, <http://www.mediareform.org.uk/wp-content/uploads/2014/04/ElephantintheroomFinalfinal.pdf>.

By mapping this data onto the UK it then allows the reader to see the extent to which different democratic communities (LADs and constituencies) are more or less well-served by a plural local news media.

Claims of democratic deficit

For at least a decade claims have been made about the ‘crisis in local journalism’ and about the negative democratic implications of changes in the local press.

Poor management, editorial neglect, the economic downturn following 2008 and the transition to digital have, Matthew Engel argued in the *British Journalism Review* in 2009, decimated the ability of our local press to serve democracy:

‘This is a tragedy not merely for our industry. It is a tragedy for our democracy, now almost moribund at local level and desperately in need of vigorous invigilators.’⁸

‘In our view’, Andrew Currah wrote in a report for the Reuters Institute, also in 2009, titled *What’s Happening To Our News*: ‘the strategic and operational responses of news publishers [to digital and economic changes]...indicate that the market is moving in directions that may expose elements of a *democratic deficit*’ [original emphasis].⁹

The Cardiff University academic Bob Franklin wrote in 2014 that the financial position of local newspapers prevented them holding power to account:

‘This “crisis of financial viability” is closely related to a “crisis of civic adequacy” [...] Starved of economic and editorial resources, these local newspaper watchdogs are constrained on a tight financial leash, no longer able to hold local politicians and governments to account’.¹⁰

This appeared to be supported by responses of local journalists to the 2015 *Press Gazette* survey. One wrote of their concerns about:

‘Low-level commercial pressure not to annoy certain advertisers. Low pay. Chronic staffing levels – our newsroom now has about half the staff it had seven years ago. The impact on what we cannot cover is dramatic.’¹¹

It is also the view the National Union of Journalists expressed in its ‘Local News Matters’ campaign:

‘These [job] cuts pose a threat to local democracy: local politicians are not being held to account, voters are not being given a range of views and voters are deprived of the information they require to make judgements when voting in elections’.¹²

8 Engel, M., ‘Local papers: an obituary’, *British Journalism Review*, 2009, 20(2): 55-62.

9 Currah, A., *What’s happening to our news?*, 2009, Oxford: Reuters Institute for the Study of Journalism.

10 Franklin, B., ‘The Future of Journalism’, *Journalism Studies*, 2014, 15(5): 481-499.

11 Turvill, W., ‘Five years ago I loved it, now I’m quitting!’ Local journalism survey reveals pay, security and clickbait concerns’, *Press Gazette*, 21 September 2015, <http://www.pressgazette.co.uk/five-years-ago-i-loved-it-now-im-quitting-survey-regional-journalists-reveals-concerns-over-pay>.

12 National Union of Journalists, ‘Local News Matters’, 2015, <https://www.NationalUnionofJournalists.org.uk/campaigns/local-news-matters>.

Rachel Howells' extensive in-depth examination of Port Talbot concluded that the town was indeed suffering from a 'democratic deficit', and that this was 'associated with the decline in local news, and with the withdrawal of journalism that created a news black hole that began to make its presence felt at the end of the 1990s'.¹³

The importance of this to the health of UK society is, some academics and journalists have argued, acute:

'Whether towns with no journalistic presence or cities with an increasingly emasculated presence, the implications for local democracy are profound. Issues of enormous relevance to citizens in their everyday lives—about their local hospitals, local schools, local transport, police forces, businesses and courts—are simply not being addressed. Local elites and decision-makers are not being questioned or held to account.'¹⁴

It is leading, another study claimed, to the alienation of communities and a sense of powerlessness:

'The importance of local news and journalism increases with a felt decline in local democracy. This research reveals a clear relationship between the two that we ignore at our peril. In one area where the local paper no longer exists there was a poignant sense of vulnerability and powerlessness that contributed in turn to a feeling of isolation and "not being listened to" by local centres of power.'¹⁵

Without a local press and the functions it served, Howells' research suggests there is growing distrust and anger:

'Surrounding all these [civic] issues, I found evidence for confusion, lack of fore-knowledge of the issues before official decisions about them were final, frustration, powerlessness, speculation, rumour, and numerous experiences of opaque public institutions that are perceived not to give adequate access to information.'¹⁶

Yet Ashley Highfield, chief executive of Johnston Press told the Culture Media and Sport Select Committee that the importance of newspaper closures had been exaggerated, and that 'the numbers of papers of record that have closed over the last decade is incredibly low'.

'The regional press has closed very few papers over the last few years...This is something that is often blown out of all proportion. The papers that have been closed were often the freesheets that were opened in the 1990s to mop up low-yielding advertising revenues when the times were good.'¹⁷

Highfield was right to say that many of the papers that closed between 2010 and 2014 had previously been free, though, based on a list of local newspaper closures published in June 2014, approximately a quarter were paid¹⁸, including the *Liverpool Post* (a paid-for daily).

13 Howells, R., 'Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper,' *PhD thesis*, 2015, page 249, University of Cardiff.

14 Barnett, S., Townend, J., 'Plurality, Policy and the Local: Can hyperlocals fill the gap?', *Journalism Practice*, 2015, 9 (3).

15 Media Trust, *Meeting the news needs of local communities*, 2010, page 8 Goldsmiths Leverhulme Media Research Centre, <http://www.mediatrust.org/uploads/128255497549240/original.pdf>.

16 Howells, R., 'Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper,' *PhD thesis*, 2015, page 249, University of Cardiff.

17 Sweney, M., 'Johnston Press chief: Local newspaper closures blown out of proportion', *theguardian.com*, 19 November 2015, <http://www.theguardian.com/media/2015/nov/19/johnston-press-chief-local-newspaper-closures-blown-out-of-proportion>.

18 Linford, P., 'Editor's blog: Why Claire Enders was wrong about newspaper closures', *HoldtheFrontPage.co.uk*, 6 June 2014, <http://www.holdthefrontpage.co.uk/2014/news/editors-blog-why-claire-enders-was-wrong-about-newspaper-closures>.

To sum up, the claims made about the crisis in local news and journalism are: that there is less on-the-ground independent reporting of local public affairs; there is less accountability journalism (eg local investigations); and there are fewer local civic campaigns.

As a consequence, such claims argue, local journalism is no longer performing a number of key democratic functions, notably: it is not acting as a 'scarecrow' (monitoring local public affairs), it is not adequately informing the public about local public affairs, it is not properly scrutinising local authorities and other sources of power, it is not giving the public an effective channel through which to campaign on local issues, and it is not providing a sense of local community and cohesion. As a consequence, it is claimed, we are at risk of less informed local populations, less local cohesion, less democratic engagement, more local corruption, and a poorer democracy.

What part does the local press play in democracy?

To test claims as to whether there is an emerging ‘democratic deficit’ in the UK as a consequence of a decline in news provision, it is first necessary to establish what role the local press (in the widest sense) is supposed to perform.

There is a normative assumption that, in order for democracies to function, citizens need to be informed of what is being done in their name. Moreover, that being informed, citizens then have opportunities to participate in the democratic process, both through voting and through channels that represent their voices and concerns – individually and collectively.

The local press has historically be expected to perform a variety of democratic functions, acting as:

1. a source of information (particularly regarding topics of public interest);
2. a ‘watchdog’ that holds powerful individuals and institutions to account;
3. a platform, or public sphere, to enable debate amongst citizens; and
4. a channel that represents citizens’ views and concerns.¹⁹

If these functions are not performed, or not performed adequately, the concern is that democracy will be poorer as a consequence. In practical terms this means; less informed citizens, less engaged citizens, less scrutiny of authorities, poorer representation of shared concerns, less community cohesion, a sense of powerlessness and a lack of connectedness.

The extent to which the press generally has performed these functions historically has been much discussed and will not be rehearsed here. However, there are fewer studies that examine the performance of the local press. David Murphy’s *The Silent Watchdog: the Press in Local Politics* (1976) critiques the local press’ performance in holding power to account.²⁰ By contrast, in *News in the Regions: Plymouth Sound to Moray Firth* (1989), Alistair Hetherington points to the success of local newspapers at exposing public interest stories missed by other media.²¹ Franklin and Murphy’s 1991 study of local newspapers also emphasises the importance of the local press, particularly for agenda-setting and as the chief source of local news.²² ‘The potential of such local newspapers for agenda-setting discussions of local matters’ Franklin and Murphy write, ‘cannot be overstated’. The authors cite research by the Independent Broadcasting Authority (IBA) showing that local newspapers provided between 50-60 per cent of local news in the 1980s – as compared to less than

¹⁹ Curran, J., *Media Power*, 2002, London: Routledge; Barnett, S., *Journalism, Democracy and the Public Interest: Rethinking Media Pluralism for the Digital Age*, Working paper, 2009, Reuters Institute for the Study of Journalism; McNair, B., ‘Journalism and Democracy’, in Wahl-Jorgensen, K., *The Handbook of Journalism Studies*, 2009, 237-249, London: Routledge; McNair, B., *An Introduction to Political Communication (Communication and Society)*, 2011, London: Routledge.

²⁰ Murphy, D., *The Silent Watchdog: the Press in Local Politics*, 1976, London: Constable.

²¹ Hetherington, A., *News in the Regions: Plymouth Sound to Moray Firth*, 1989, Basingstoke: Palgrave MacMillan.

²² Franklin, B., Murphy, D., *What News?: The Market, Politics and the Local Press*, 1991, page 12, London: Routledge.

20 per cent for TV, radio, magazines or word of mouth. Less than a decade later the same authors were already noting the downward trend in readership and search for cost cutting.²³

More recently studies have tended to focus on specific aspects of the decline of the local press. This has included its economic problems,²⁴ in particular the decline of advertising revenue,²⁵ or circulation.

Two recent studies focus directly on the issue of the decline in local news provision and its impact on the ability of the local press to perform its democratic functions – one taking a geographic perspective and the other looking at a particular newspaper. Rachel Howells' doctoral thesis focuses in great detail on this question with respect to the south Wales town of Port Talbot.²⁶ Howells spent four years doing primary research to assess whether a democratic deficit was emerging in the town following the closure of its dedicated weekly newspaper, the *Port Talbot Guardian*, in 2009. Keith Perch's study, presented at the Future of Journalism conference 2015 but not yet published, examines the travails of the *Leicester Mercury*, a paper that has seen its circulation drop from 'a high of 157,000 a day in 1984 to just 30,448 in the six months to June 2015'.²⁷

A separate 2014 report, *Addressing the Democratic Deficit in Local News through Positive Plurality* gathers existing secondary evidence on the problem before focusing on ways in which to address the issue.²⁸

These studies, valuable as they are, do not – and are not intended to – give a comprehensive contemporary picture across the UK. Nor do they seek to compare the provision of local news and information across the UK's diverse individual democratic communities, for example at the local authority or constituency level. This is the level, across the UK, where we need further analysis, since this is the level at which citizens are expected to make democratic judgments. UK citizens can vote for local councillors in their LAD (as on 5 May 2016). Similarly UK citizens can vote for a Member of Parliament to serve their constituency every five years. We rely, in order for these votes to be informed, on news and information provided about the candidates and their track records. It therefore makes sense to analyse the provision of local news at this level. That is what this study aims to do.

23 Franklin, B., *Local Journalism and Local Media: Making the Local News*, 1998, London: Routledge.

24 Currah, A., 'What's happening to our news?', 2009, Oxford: Reuters Institute for the Study of Journalism; and Franklin, B., 'The Future of Journalism', *Journalism Studies*, 2014, 15:5, 481-499.

25 Picard, R., 'Shifts in Newspaper Advertising Expenditures and their Implications for the Future of Newspapers', *Journalism Studies*, 2008, 9(5), pp704-716.

26 Howells, R., 'Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper', PhD thesis, 2015, University of Cardiff.

27 Perch, K., 'The collapse of the business model of regional newspapers has been far greater than previously stated and is undermining public sphere journalism', Unpublished paper presented at the Cardiff University Future of Journalism Conference, 2015 (referenced with permission of the author).

28 Moore, M., *Addressing the Democratic Deficit in Local News through Positive Plurality*, 2014, London: Media Standards Trust <http://mediastandardstrust.org/wp-content/uploads/2014/10/Positive-Plurality-policy-paper-9-10-14.pdf>

Lack of sufficient evidence

The numerous claims about a growing democratic deficit are, if proven, sufficiently serious to warrant policy intervention. They are, however, contested and in a number of areas there is not yet sufficient evidence – as this study will show – with which to make a fully informed assessment. There is not yet enough in-depth, comprehensive, or up-to-date information, for example, about the provision of public interest news and information in individual democratic communities across the UK.

The information that does exist, for example on which local newspapers are published and their circulations, is neither comprehensive nor accurate (as shown in the methodology below). Moreover, there are areas of concern that lack almost any evidence base. There is, for example, no comprehensive or up-to-date publicly available data on:

- the number of local newspapers in the UK
- which local communities these newspapers serve
- which newspaper groups are dominant in different areas
- where there are areas that are well served by local news and information, and where there are areas that are poorly served
- what public interest news and information is provided by different local news outlets and the extent to which it is particular to that community.

The existing data on the number of local newspapers and the areas they serve is incomplete, often inaccurate, and does not examine the question of news provision from the perspective of the citizen rather than the publisher. It can tell us, in other words, how many newspapers are sold, how many clicks a website is attracting, and what income these generate (though as this report shows, even this information is not compiled in a structured format, nor is it fully available to the public), but not how well the different communities in the UK are served.

This lack of evidence extends to our knowledge of the extent to which the Fourth Estate function of the press is, or is not, being performed by the local press or other local media. We do not know, for example, which local councils or local courts are attended, and reported on, by a local journalist. We do not have content analysis across multiple titles to show what public interest journalism is being published and what is not. Our evidence of the relationship between public relations and local journalism – ‘churnalism’ for example – dates from before the 2008 financial crisis.²⁹

29 Lewis, J., A., Williams, B., Franklin, J., T., Mosdell, N, *The Quality and Independence of British Journalism*, 2006, Cardiff University <http://www.cardiff.ac.uk/jomec/resources/QualityIndependenceofBritishJournalism.pdf>

Without such evidence it is difficult to decide the extent to which there is a problem, the nature of the problem, or the urgency of any need to explore possible interventions. Policymakers are less able to assess whether there is a need for further investigation, or to formulate targeted solutions.

This report is intended to provide evidence to help answer some – but by no means all – of these questions. It sets out to understand the extent to which different local communities, in different parts of the country, appear to be well served, underserved, or not served at all, by a dedicated local newspaper; and the extent to which they are served by a sufficient plurality of news media enterprises.

The report focuses primarily on the local press – the locations served and how much diversity there is. It then correlates these findings with existing research on local TV and hyperlocal news sites, in order to map the degree of news provision by local area district and by constituency.

To help interpret the data we have collected for this report, we have drawn up maps based on the data, which are also available online.³⁰ This allows readers to look at the spread of the local press by each LAD and by constituency.

This report is intended to mark a first step into a broader analysis of how well local communities are served by their local news providers. Further additional research is needed: on the extent to which local councils, courts and other local bodies are being scrutinized; on the extent to which the provision of local public-interest news is being affected by the reduction and displacement of local journalists; and on the effects of accelerating concentration and consolidation in local newspapers on the diversity and plurality of local news provision across the country.

³⁰ <http://www.localnewsmapping.uk>.

Methodology

The primary analysis in this report is of the number of local daily and weekly newspapers in the UK, their ownership, and the areas in which they provide coverage. The publicly available data on local newspapers contains some notable gaps, and this project sought to create a comprehensive list of titles by using a variety of sources. The challenges presented by this approach are outlined in this section.

During the data collection period of this project, two significant deals affecting ownership of the local press took place. In May 2015, Newsquest – already holding almost 200 local titles – bought Romanes Media Group, acquiring a further 29 local titles in the process.³¹ This was followed in October 2015 by a deal of even greater significance for plurality in the local news market – the purchase of Local World by Trinity Mirror³² (which also included the sale of some Local World titles to Iliffe News and Media.)³³ Some local papers were also closed in this period, notably the closure of 11 titles by Johnston Press in October 2015. This was quickly followed by a further closure by Johnston Press and the merger of six other titles into three.³⁴ The data included in the report goes up to the week beginning Monday 2 November 2015.

Quantifying local newspapers in the UK

Establishing the exact number of distinct local newspapers available in the UK proved to be a difficult and time-consuming process, due to deficiencies in existing publicly available databases. These databases miss out a number of newspapers, and in many cases contain only grouped or aggregate information for a number of titles covering different local areas.

For this analysis, a new and comprehensive list of individual local newspaper titles, including distinct sub-editions, was generated, using a variety of information sources. The creation of this list is described in depth below.

Identifying which areas of the UK are covered by distinct titles required adopting a uniform unit of geographical analysis to produce consistent and comparable results. The 406 LADs across all different nations in the UK were used. Where data for Northern Ireland were not available (all measures relying on circulation data), the 380 LADs in Scotland, England and Wales were used.

31 Ponsford, D., 'Newsquest acquires 29 more newspapers as it buys Greenock Telegraph publisher Romanes', *Press Gazette*, 26 May 2015, <http://www.pressgazette.co.uk/newsquest-acquires-29-more-newspapers-its-buys-greenock-telegraph-publisher-romanes>.

32 Sweney, M., 'Trinity Mirror confirms \$220m Local World Deal', *The Guardian*, 28 October 2015, <http://www.theguardian.com/media/2015/oct/28/trinity-mirror-local-world-deal>.

33 Linford, P., 'Trinity Mirror-Local World-Iliffe deal: The titles changing hands', *Hold the Front Page*, 29 October 2015, <http://www.holdthefrontpage.co.uk/2015/news/trinity-mirror-local-world-iliffe-deal-the-titles-changing-hands/>.

34 Turvill, W., 'Johnston Press announces closures of 11 free titles to focus on 'digital offering'', *Press Gazette*, 7 October 2015 <http://www.pressgazette.co.uk/johnston-press-announces-closures-11-free-titles-focus-digital-offering>; Turvill, W., 'Further Johnston Press newspaper closures emerge: Northern Ireland loses two weeklies', *Press Gazette*, 22 October 2015, <http://www.pressgazette.co.uk/further-johnston-press-newspaper-closures-emerge-northern-ireland-loses-two-weeklies>.

Difficulties faced when compiling local newspapers

Gaps in existing datasets are in part due to the large number of titles, and relatively regular ‘churn’ of the figures due to closures, mergers and the creation of new titles. However, some of the sources of data – including the brand lists provided publicly or on request by some publishing groups – are (at the time of writing) out-of-date, and some combine multiple individual and distinct titles into single grouped cases.

In order to compile as comprehensive a list of local titles as possible, this report used numerous different data sources and, where necessary, newspapers and news groups were contacted directly. Given the discrepancies between the sources, the number of newspapers involved, and the regularity with which newspapers change hands, merge or close, it must be borne in mind that a small number of titles may have escaped inclusion.

A multi-step process of identifying and recording titles was used. The first stage was an audit of four main sources:

- ♦ **The Local Media Works Database:** a database of newsbrands maintained by Local Media Works, part of the News Media Association (NMA) – a representative group set up by the national, regional and local newspaper industry to promote their interests. This is closely linked – but not identical – to the Joint Industry Committee for Regional Media Research (JICREG) database.
- ♦ **MediaTel Connected:** a service aggregating UK media data and information across most print and audio-visual industries
- ♦ **British Newspapers Online (www.britishpapers.co.uk):** a website listing local newspapers in the UK and Northern Ireland, grouped by local government area. This website contains extensive information on the different editions of local papers available
- ♦ The **newsbrand lists** provided by the local news publishers themselves (where available).

An illustration of the inadequacies of these databases is illustrated in Table 1 which outlines the availability of information on the 11 Johnston Press titles closed in early October 2015. Of these 11 titles, only two were included in the Local Media Works/JICREG database. The MediaTel Connected database contained information on three titles, not including the previous two. The British Newspapers Online database contains information on nine of the 11 papers, but still does not contain the full list.

While the number of titles uncovered in this project (1,112) is very close to the figure of 1,100 presented by Local Media Works,³⁵ it is not entirely clear how they arrived at this figure, given the tendency of their available data to aggregate separate editions or related newspapers together.³⁶

³⁵ <http://www.localmediauk.org/Research-Insight/Facts-Figures>.

³⁶ The News Media Association, into which the former Newspaper Society was merged in 2014, was contacted on two separate occasions in August and November 2015 regarding their data on lists of local newspaper titles in the UK. Neither query received a response.

Table 1: Discrepancies in local newspaper databases

Newspaper	Local Media Works/JICREG	MediaTel	British Newspapers Online
<i>Peterborough Citizen</i>	X	X	✓
<i>Norfolk Citizen</i>	X	X	X
<i>Rugby Review</i>	X	✓	✓
<i>Northampton Mercury</i>	X	X	✓
<i>Dronfield Advertiser</i>	✓	X	✓
<i>Eckington Leader</i>	✓	X	✓
<i>Peak Courier</i>	X	✓	✓
<i>Sheffield Gazette</i>	X	X	✓
<i>South Elms Gazette</i>	X	X	X
<i>South Bognor View</i>	X	X	X
<i>Lutterworth Mail</i>	X	✓	✓

Where possible, lists of newsbrands were obtained from the major publishers. These are generally available to the public online, but were in some cases out of date, not having taken into account recent closures.

As well as the cross-tabulation of data using the available large datasets, local titles with no website (often sister-titles and freesheet companions to paid newspapers) were investigated using web and social media searches.

In recognition of the transition to digital local news provision, online-only titles were included in the list, where such titles had previously been in print, or are included on the brand lists of major publishers. Online-only papers were designated as ‘daily’ or ‘weekly’ based on the titles they were derived from and on how many articles they published over the course of a week.

The industry websites *Press Gazette* and *Hold the Front Page* were searched for information on newspaper closures over the past five years to determine which titles remained in official databases incorrectly. These sites provide an invaluable service in documenting closures and mergers in a way that official newspaper industry sources do not.

The titles located through web or social media search, where no evidence was available regarding frequency of publication, or whether the title remained in publication, were contacted directly to find out this information. It is possible, however, that a small number of newspapers which have in fact closed are included in the database.

These techniques produced a list of 1,112 local newspapers (including sub-editions).

Establishing eligible newspapers

All titles which published one or more issues per week were included. This covers dailies, weeklies (including Sundays) and the significant number of titles which are published twice a week. The relatively small number of fortnightly and monthly newspapers were not included. *The Black Country Bugle*, a Local World (now Trinity Mirror) title that focuses on local history, was not included.

Very large ‘national’ regional newspapers, such as the *Daily Record* in Scotland, the *Western Mail* in Wales, or the *Irish News* in Northern Ireland are not included in this analysis. This decision was taken in recognition of the fact that these newspapers focus on large geographical areas and populations, and therefore do not provide targeted local news for citizens at the community level. The *Evening Standard* was also not included in the analysis for similar reasons. With a catchment area encompassing over 8 million people, it is very difficult to argue that it provides in-depth local coverage at the community level.

This study does not assert that these newspapers are not an important part of the UK’s news ecology, or that they do not publish news that deals with local issues. However, these newspapers cover such large geographical areas that they lack the space or resources to provide sustained coverage of news at the local level. An analysis of the *Evening Standard* website indicates that a large number of London boroughs are the subject of less than one article per day.

While it is certainly the case that London, Scotland, Wales and Northern Ireland are covered by daily and weekly local newspapers, this study is focused at the level of LADs, each of which is only intermittently the subject of attention from these regional papers.

Measuring significant coverage

Print coverage

Where the project assesses which local news sources are available to communities at the LAD level, certain metrics are available:

- circulation (available via Audit Bureau of Circulation (ABC) statistics) (Local Media Works database; JICREG; MediaTel)
- Average Issue Readership (AIR based on ABC stats multiplied by a ‘readers per copy’ value) (JICREG)
- website audience data (JICREG).

Unfortunately, none of these sources cover Northern Ireland, and since the data provided by LMW/JICREG/MediaTel contains some gaps, the decision was taken to use circulation data, for the following reasons:

- AIR data from JICREG is based on circulation anyway, multiplied by a modelled or actual ‘readers per copy’ figure. Certain data from the LMW circulation database was missing from the JICREG AIR data, so further gaps in data would have been encountered.³⁷

³⁷ For example, the *Ellon Advertiser* is included in the LMW database, but not JICREG. Certain data issues were also apparent in JICREG, such as the *Aberdeen Citizen* receiving an ‘Average Issue Readership’ score lower than its circulation.

- Only approximately half of the titles in the JICREG database have accompanying website audience data.

In order to establish where an LAD was covered by a daily or weekly local paper, certain criteria were used. To filter out newspapers with negligible circulation within LADs³⁸ a household penetration threshold was set at a relatively low level. Circulation thresholds were also applied, to account for disparities in population density between close or adjacent LADs.

These thresholds were chosen to filter out those titles that are registered as circulating within an LAD by the LWM/JICREG database, but which in fact sell only a very small number of copies in, or are located a considerable distance away from, the LAD in question (such as the circulation of certain Scottish local papers in English cities).

Daily newspaper coverage was recorded in an LAD if the following two criteria are met:
Newspaper has a per cent 'household penetration' score of five per cent or greater within the LAD
AND
Newspaper sells ten per cent or more of its total circulation in that LAD.

Weekly newspaper coverage was recorded in an LAD if any combination of these criteria is met:
Newspaper has a per cent 'household penetration' score of five per cent or greater within the LAD
OR
Newspaper sells 40 per cent or more of its total circulation in that LAD.

Measuring monopolies and dominant providers at the local level

The project also gathered information on the monopoly provision of local newspapers, namely where citizens within LADs are served by only a single publisher. This is supplemented by information on which LADs are served by a dominant publisher (providing over 50 per cent of circulation). Again, Northern Ireland data is not available for these measures.

The same thresholds for denoting coverage were used; again, circulation was used as the most reliable – if imperfect – measure of local newspaper impact.

Ownership data was calculated as follows:

- For each LAD, all newspapers passing the coverage thresholds (outlined above) were selected and grouped by publisher.
- The proportions of total LAD circulation for each publisher group were calculated.

³⁸ For example, the LWM/JICREG database has *The Orcadian* (a local newspaper covering the Orkney Islands) as one of the local papers circulating in Glasgow, with a circulation of 233. In Bexley, Southeast London, the *Lewisham & Greenwich News Shopper* is included as circulating locally, despite a registered weekly circulation of three copies.

- LADs were categorised as having a monopoly where one publisher accounted for 100 per cent of circulation.
- LADs were categorised as having a dominant provider where one publisher accounted for over 50 per cent of circulation.

In practice, ‘dominant providers’ tended to have around 70-80 per cent of circulation.

This also allows us to map publisher dominance across England, Scotland and Wales and to identify where certain publishers control or have dominance in certain geographical areas.

Measuring constituencies

The analysis of constituency coverage used the data.gov.uk database³⁹ to record which LADs include (wholly or in part) each of the 650 parliamentary constituencies in the UK.

Where a parliamentary constituency sits wholly or partly within an LAD that is covered by a local daily paper, it was recorded as being covered by that daily. In lieu of more granular data on exact geographical coverage of local daily newspapers, this serves as a useful means of estimating which constituencies receive daily coverage, although it should be noted that this is more likely to overestimate than underestimate the number of constituency areas with local daily newspaper coverage.

Where constituencies sat partly in one or more LADs with daily local newspaper coverage and partly in one or more LADs without such coverage, the constituency was always recorded as receiving daily coverage.⁴⁰

Using the database of news articles on parliamentary constituencies gathered as part of the Election Unspun project, all constituencies were checked against the number of news articles published by the UK’s national news media during the official 2015 general election campaign (from 30 March to 6 May 2015).⁴¹ In this way it was possible to measure which constituencies lacked both day-to-day local coverage and substantial national news coverage during a major election period.

Local newspaper websites – sampling

In order to assess whether focusing on print circulation figures gave a representative view of plurality at the local level, a sample of LADs was selected and the provision of local newspaper websites in those areas measured.

The sample consisted of 55 LADs: 20 which received monopoly coverage by a single local newspaper provider; 20 in which one publisher was dominant (in which at least one other publisher was present); and 15 in which three or more publishers operated in the LAD.

³⁹ <https://data.gov.uk/dataset/local-authority-districts-2012-to-westminster-parliamentary-constituencies-2012-uk-lookup>.

⁴⁰ For example, the constituency of Mid Derby sits partly in the Derby LAD (covered by a daily paper, the *Derby Telegraph*) and partly in Amber Valley and Erewash, neither of which are covered by a daily paper. Mid Derby was subsequently recorded as receiving daily coverage.

⁴¹ Full methodology available at Moore, M. and Ramsay, G., *UK Election 2015: Setting the Agenda*, 2015, King’s College London, <https://www.kcl.ac.uk/sspp/policy-institute/publications/MST-Election-2015-FINAL.pdf>.

The JICREG website audience data for each LAD was used to compile the number of publishers and titles available in each area, as well as the number and proportion of adults in that LAD each title or website reached in an average month. The threshold for inclusion was a minimum of five per cent audience reach in each LAD, and the measure of ‘dominance’ was formulated in the same way as for print newspapers.

Population

Where UK or LAD population figures are quoted, 2011 Census figures are used, as the most recent comprehensive list (by LAD) of population figures.

Context & background

The continuing importance of the 'local paper'

Multiple studies have shown that, while new forms of news provision are emerging, and local authorities are starting to use digital tools to publish news and information, the local paper continues to play an indispensable role in the provision of professionally produced news about local public affairs.⁴²

This is partly because sources of authority remain sceptical about the 'motives, legitimacy and credentials of citizen-produced journalism', and do not have the resources or capabilities to reliably produce news on their own:

'While it is alluring to assume that the communication ecology within which local democracy operates is being reconfigured around the participatory potential of digital media, thereby diminishing the value of mainstream media, our evaluation of the structural opportunities and constraints which shape the local communication ecology in Leeds suggests that this is not (yet) happening.'⁴³

This continuing reliance on the local paper is not peculiar to the UK. Other western democracies also still rely on the local newspaper for the collection and publication of regular local news. In Denmark, for example, though there are multiple sources of information and entertainment available, when it comes to 'independent and professionally produced news about local affairs, closer scrutiny shows that most of what is available originates from a single source, the local newspaper, whose newsroom is primarily funded by its eroding print business.'⁴⁴

For this reason it is valid and necessary to measure the provision and diversity of local newspapers (including their manifestations online), as long as these are viewed in the context of digital news provision and the emergence of new forms of news publishing.

Moreover, as is shown in this section, though new sources of news and information are emerging, they are sporadic, hugely different in scale and ambition, and many are in a highly precarious financial position. Some individuals are using social media and other digital platforms to communicate local news, but not in a consistent, regular or comprehensive manner. Those that are, are included in the definition of 'hyperlocal' news provider. The digital intermediaries themselves – Google, Facebook, Twitter – do not publish local news or employ local journalists.

42 Firmstone, J., Coleman, S., 'Rethinking Local Communicative Spaces: Implications of Digital Media and Citizen Journalism for the Role of Local Journalism in Engaging Citizens,' in, Nielsen, R. K., *Local Journalism: The Decline of Newspapers and the Rise of Digital Media*, 2015, London: IB Taurus.

43 Ibid, page 134.

44 Nielsen, R.K., *Local Journalism: The Decline of Newspapers and the Rise of Digital Media*, Reuters Institute for the Study of Journalism, 2015, London: IB Taurus.

The decline of the local paper – a short history

Decline in the number of local print newspapers

Concern about the decline in number of local print newspapers in the UK is not new. In 1947 the National Union of Journalists was alarmed by the 20 per cent drop in the number of daily newspapers published over the previous two decades. ‘Twenty years ago, the union wrote to the first Royal Commission on the Press, ‘144 daily newspapers were published in England, Scotland and Wales...Now there are 116’.⁴⁵ The second Royal Commission on the Press, in 1961-62, was prompted by anxiety about the closure of provincial newspaper titles and the national *News Chronicle*, and higher concentration of ownership. By 1990, the number of provincial morning newspapers had dropped by another third from its 1945 level.⁴⁶

In 1985, prior to the mass adoption of the internet, Bob Franklin records that the number of local newspapers was 1,687 (including local Sunday papers and free papers). This fell to 1,286 papers by 2005.⁴⁷ From 2004 to 2011, *Press Gazette* reported that 242 local newspapers closed. This was updated in 2015 when *Press Gazette* reported that ‘More than 300 local newspapers have been closed in the past ten years, according to *Press Gazette* research.’⁴⁸ Other reports have stated that 150 local papers have closed in the UK since 2008,⁴⁹ and that 141 local papers closed between March 2011 and 2013.⁵⁰

Mathematically this would appear to take the number of local papers to below a thousand, though research for this report suggests the number is still just above 1,100. Comparing the number of local papers identified in this report with the 1,687 identified by Franklin in 1986 would represent a 35 per cent decline in the number of local titles in 30 years.

This decline is less than was forecast by some following the 2008 economic crash. The media analyst Claire Enders predicted in 2009 that half the UK’s local newspapers would close within five years.⁵¹ In fact, the local press has proved more resilient than indicators at the time suggested, and the drop in the number of titles from 2009 to 2015 has been less than 15 per cent. In this respect, the survival of more local newspapers than expected may be seen as ‘the great escape of the post-2008 media downturn,’ though this does not account for the changes made to these titles in order to preserve them.⁵²

45 Jay, J., Bundock, C., National Union of Journalists, from 144 to 116, ‘Written Evidence to the Royal Commission on the Press, 1947’ in *Great Britain, Royal Commission on the Press: Report*, 1949, London: HMSO.

46 Seymour-Ure, C., *The British press and broadcasting since 1945*, 1991, Oxford: Blackwell.

47 Franklin, B., ‘Attacking the devil? Local journalists and local newspapers in the UK’, in Franklin, B., *Local journalism and local media: making the local news*, 2006, London: Routledge.

48 Turvill, W., ‘Johnston Press closures mean more than 300 UK local newspapers have gone in last ten years’, *Press Gazette*, 8 October 2015, <http://www.pressgazette.co.uk/johnston-press-closures-mean-more-300-uk-local-newspapers-have-been-closed-ten-years>.

49 Institute for Welsh Affairs, IWA *Wales Media Audit*, 2015, page 68, http://www.clickonwales.org/wp-content/uploads/IWA_MediaAudit_v4.pdf.

50 Media Reform Coalition, *The elephant in the room: a survey of media ownership and plurality in the United Kingdom*, 2014, <http://www.mediareform.org.uk/wp-content/uploads/2014/04/ElephantintheroomFinalfinal>.

51 Oliver, L., ‘Half UK’s regional newspapers to close in five years, predicts Enders’, *journalism.co.uk*, 16 June 2009, <https://www.journalism.co.uk/news/half-uk-s-regional-newspapers-to-close-in-five-years-predicts-enders/s2/a534780/>.

52 Ponsford, D., ‘The survival of UK regional dailies and their digital growth is the great escape story of the media downturn’, *Press Gazette*, 27 August 2015, <http://www.pressgazette.co.uk/content/survival-uk-regional-dailies-and-their-accelerating-digital-growth-great-escape-story-media>.

Decline in circulation and revenues of local print newspapers

Circulations of local print newspapers, which have been declining for many decades, have fallen more rapidly with the growth of the internet. Local advertising, much of which used to go through the local press to reach intended markets, is now split amongst many online and offline publishers and digital intermediaries. Classified advertising – including job advertisements that made up a larger proportion of local newspaper revenue than at other commercial news providers – is as likely to be published on an employer's own website or on a lower cost service like Craigslist or Gumtree as it is to be published in a local paper or its website.

Revenues of the local press, which in most cases have been even more reliant on advertising income – particularly from classifieds – than cover price, have declined significantly and in some cases have more than halved.⁵³ Local papers have also had to adapt to the changing technological environment by investing in new technologies, in new skills and training, and in new methods of distribution. With lower revenues and less investment, many local newspaper businesses have been obliged to reduce costs. This has been achieved by reducing publishing costs, newspaper closures, and redundancies.

From 2005 to 2010 the revenue of the four leading local newspaper companies in the UK dropped by between 23 per cent and 53 per cent, according to analysis by Enders Analysis for the Leveson Inquiry.⁵⁴ This was partly as a consequence of a drop in print circulation, and partly due to the decline of advertising revenue. In the 13 years from 2000 to 2013 print circulation of paid regional dailies in the UK fell by over half.⁵⁵ In 2014, 93 per cent of the 1,048 newspapers audited by the Audit Bureau of Circulation saw their circulation fall.⁵⁶

Circulation figures for individual titles across England and Wales have, in many cases, fallen below 30,000.⁵⁷ This includes even august titles like the *Yorkshire Evening Post* (c.27,000), the *Sheffield Star* (20,000) and Wales' *Western Mail* (19,000). The *Newcastle Chronicle* had just over 30,000 at the end of 2015.⁵⁸

Local newspaper advertising income fell 'by an average of 6.6 per cent per annum over the period from 2009 to 2013.' The drop included both display advertising and classified advertising. 'Classified advertising expenditure – a staple of the regional newspaper sector – fell 63 per cent between 2007 and 2012.'⁵⁹ Many advertisements, particularly classified migrated online, notably to the platforms of major digital intermediaries like Google and Facebook. The former *Guardian* editor, Alan Rusbridger, raised this point while addressing the

53 Picard, R., G., 'Shifts In Newspaper Advertising Expenditures And Their Implications For The Future Of Newspapers', *Journalism Studies*, 2008, 9:5, 704-716; Perch, K., 'The collapse of the business model of regional newspapers has been far greater than previously stated and is undermining public sphere journalism', unpublished paper presented at the Cardiff University Future of Journalism Conference, 2015.

54 Enders Analysis, 'Competitive Pressures on the Press, presentation to the Leveson Inquiry', 2011, <http://webarchive.nationalarchives.gov.uk/20140122145147/http://www.levesoninquiry.org.uk/wp-content/uploads/2012/07/Claire-Enders-Competitive-pressures-on-the-press.pdf>

55 Communications Management Inc, 'Daily Newspaper Circulation Trends 2000-2013: Canada, United States, United Kingdom', a discussion Paper, 2013, http://media-cmi.com/downloads/CMI_Discussion_Paper_Circulation_Trends_102813.pdf.

56 Shackleton, E., 'Map of UK's local newspapers and websites reveals London news gap', *Press Gazette*, 4 June 2015, <http://www.pressgazette.co.uk/map-uks-local-newspapers-and-websites-reveals-london-news-gap>.

57 Circulation data obtained from MediaTel, November 2015.

58 Figures obtained from <http://www.nsdatabase.co.uk/>.

59 Oliver and Ohlbaum, *UK news provision at the crossroads: The news market in the 21st Century and the likely implications for the BBC's role*, a report for the News Media Association, 2015, http://www.newsmediauk.org/write/MediaUploads/PDFper cent20Docs/OandO_NMA_-_UK_news_provision_at_the_crossroads.pdf.

House of Lords Select Committee on Communications in 2010:

‘Google is killing off classified advertising. The property, cars and job ads are all going, so your two main sources of revenue are disappearing and the response of virtually all the newspapers’ owners is to then cut back on the editorial costs.’⁶⁰

Research by Oliver and Ohlbaum suggests that revenue from advertising dropped by over half from 2007 to 2012, with almost £1.5 billion less spent in the later year.⁶¹

The decline in circulation and revenues of the local press is very well illustrated by Keith Perch’s study of the *Leicester Mercury*. Perch, who was editor of the *Leicester Mercury* from 2009 to 2011, charts the decline of revenues and staff at the paper from the mid-1990s until 2014.⁶²

‘In 1996, it [The *Leicester Mercury*] brought in almost £59 million revenue and employed 581 staff (Leicester Mercury Group Ltd 1996). By 2011, its revenues had plummeted to £16 million and it employed just 107 staff (Leicester Mercury Media Group Ltd 2011).’

This, as Perch points out, represents a drop of revenue and staff of over 80 per cent. His analysis of the accounts of Johnston Press, the UK’s largest local newspaper group, indicates that the figures for the *Leicester Mercury* are not unrepresentative of the local newspaper industry more broadly.

Decline in number of editorial staff at local print newspapers

In addition to the decline in number of local newspapers there has been a decline in the number of professional journalists working for local newspapers. The combination of the two, combined with the centralisation of some local resources and changes to the nature of the work required of local journalists has been a central cause, some argue, of the inability of the local press to perform the democratic functions expected of it. This is because, as a result, there are fewer papers, and fewer journalists to cover ‘beats’ such as councils, courts, schools business and hospitals. Moreover, those journalists that remain are more constrained – by time, resource and location – in what they can report on. As a consequence there is less monitorial journalism, less original reporting, and less public interest news.

Yet, though it is clear that there has been a decline, it is difficult to find reliable and consistent data on the number of journalists and editorial staff employed by the local press over time. A National Union of Journalists Commission on multimedia in 2007 found that ‘there had been editorial job cuts at 45 per cent of titles since online operations were introduced’.⁶³ In 2010, Francois Nel estimated ‘that the UK’s mainstream journalism corps has shrunk between a quarter and a third over the past decade (and 30-40 per cent on the 2001 estimates widely used by the industry). The same report - ‘#LaidOff’ –

60 House of Lords, Select Committee on Communications, *The ownership of the news: Volume 1 Report*, 2008, HL Paper 122-I, page 46, <http://www.publications.parliament.uk/pa/ld200708/ldselect/ldcomuni/122/122i.pdf>.

61 Oliver and Ohlbaum, *Research on Local Advertising Markets: A report for Nesta*, 2013, https://www.nesta.org.uk/sites/default/files/research_on_local_advertising_markets.pdf.

62 Perch, K., ‘The collapse of the business model of regional newspapers has been far greater than previously stated and is undermining public sphere journalism’, unpublished paper presented at the Cardiff University Future of Journalism Conference, 2015.

63 National Union of Journalists, ‘Sharing the Future: Commission on Multimedia Working’, 2007, referenced in Freedman, D., ‘The Political Economy of the ‘New’ News Environment’ in Fenton, N., *New Media, Old News*, 2010, page 16, London: Sage.

cites Newspaper Society figures stating there was 'a 13.75 per cent contraction in the number of local and regional press jobs between 2002 and 2007'.⁶⁴

'This exercise [finding the number of journalists employed], once again highlights the shortage of reliable, comprehensive tracking data about the industry.'

An Enders Analysis report also noted that 'we lack reliable data' on the number of UK journalists.⁶⁵ In 2014 Bob Franklin wrote that 'Editorial staffs are still shrinking although more slowly than during the 2008–9 peaks and at differential rates reflecting the circumstances of distinctive media platforms, media sectors and national settings'.⁶⁶ In October 2015 *Press Gazette* estimated that the number of professional journalists employed in the local press was about half what it had been before 2008:

'Before the financial crash of 2008 the Newspaper Society estimated there were 13,000 journalists employed in the regional press. The trade body (now called the News Media Association) no longer keeps figures, but Press Gazette's preliminary research of Companies House figures kept by individual companies suggest that the current total may be half that figure.'⁶⁷

Enders Analysis was sceptical that the overall number of journalists had dropped considerably, referencing the stability of the Office of National Statistics data on total number of journalists in the UK, which has remained at around 60,000 since 2000.⁶⁸ It acknowledged, however, that this general figure could obscure bigger changes between different types of journalist, such as magazine vs local. Oliver and Ohlbaum's 2015 report appeared to substantiate *Press Gazette* estimates. It stated that Trinity Mirror reduced its workforce by 47 per cent between 2008 and 2013, Johnston Press by 46 per cent over the same period, and Archant by 27 per cent.⁶⁹ Yet the same report stressed that the job cuts were targeted more at non-editorial staff.

Decline at specific news groups

To further gauge the number of editorial jobs lost over the last decade one has to look at the news companies themselves, and their public statements. Most of these have been reported by the industry journals the *Press Gazette* and *Hold the Front Page*. Since mid-2014 the National Union of Journalists has sought to record redundancies on its website - chiefly by tracking *Press Gazette* reports and those at *Hold the Front Page*.⁷⁰

From this record and previous news reports it is possible to form a clearer picture of the loss of editorial jobs in the local press. It shows that most of the major local newspaper groups have made significant editorial redundancies in the last seven years (see below). At the same time many of them have created new digital posts, though these do not appear to make up for the reductions in editorial staff.

64 Nel, F., '#LaidOff: What do UK journalists do next?', UCLAN & journalism.co.uk, 2010, <https://www.journalism.co.uk/uploads/laidoffreport.pdf>.

65 Enders Analysis, *The BBC, the press and online news*, 25 August 2015.

66 Franklin, B., 'The Future of Journalism', *Journalism Studies*, 2014, 15:5, 481-499, page 482.

67 Turvill, W., 'Johnston Press closures mean more than 300 UK local newspapers have gone in last ten years', *Press Gazette*, 8th October 2015, <http://www.pressgazette.co.uk/johnston-press-closures-mean-more-300-uk-local-newspapers-have-been-closed-ten-years>.

68 Enders Analysis, *The BBC, the press and online news*, 25 August 2015.

69 Oliver and Ohlbaum, 'UK news provision at the crossroads: The news market in the 21st Century and the likely implications for the BBC's role', a report for the News Media Association, 2015, page 40, http://www.newsmediauk.org/write/MediaUploads/PDFper cent20Docs/OandO_NMA_-_UK_news_provision_at_the_crossroads.pdf.

70 National Union of Journalists, 'Roll call of newspaper closures and job losses', *National Union of Journalists.org.uk*, 9 June 2015, <https://www.NationalUnionofJournalists.org.uk/news/roll-call-of-newspaper-closures-and-job-losses>.

Between 2009 and 2014 Johnston Press reduced the number of editorial and photographic staff by 49 per cent - from 2,222 in 2009 to 1,133 in 2014. Over the same period it reduced its production staff by 66 per cent, from 1,029 to 355. *Press Gazette* estimates that the number of editorial and photographic staff fell by a further 10-15 per cent in 2015.⁷¹

Newsquest employs approximately 4,000 people, not all of whom are editorial staff.⁷² Since 2008 the company has reduced the number of editorial employees regularly. In the twelve months after December 2013 Newsquest made 228 staff redundant.⁷³ The following year, it cut more than 140 further positions.⁷⁴ The number of staff photographers has been reduced, with journalists expected to take photographs. According to the National Union of Journalists, 'One Newsquest title is regularly using a nine year old boy to provide sports photographs.'⁷⁵

As with other groups Trinity Mirror has made a series of redundancies since 2008. It has also taken over news groups shortly after those groups made significant cuts in staff. In the two years between 2013 and 2015 Trinity Mirror cut between 100 and 200 editorial jobs.⁷⁶ It also announced it was planning to make further spending cuts in 2015, of £20 million, though it was not clear how much of this would come from further job cuts.

Media Wales, a company operating within Trinity Mirror (as the Western Mail and Echo until 2007), reduced editorial staff considerably in the years leading up to 2010. In south Wales, for example, the number of editorial and production staff at Media Wales dropped from almost 700 in 1999 to 136 in 2010.⁷⁷

Trinity Mirror took full control of Local World in 2015. Local World was formed in 2012 from a combination of Northcliffe Media and the Iliffe newspaper group. Prior to its acquisition Northcliffe shed almost half of its staff, reducing its employees from 4,200 to 2,200 between 2008-9 and 2012.⁷⁸

Most recently the news groups have moved to outsource design to reduce cost. The National Union of Journalists reported that Johnston cut 30 design roles and outsourced work to India in September 2014.⁷⁹ News groups are also making staff photographers redundant and using freelances, publicly available photographs, or photographs taken by the journalists themselves.⁸⁰

71 Turvill, W., 'Johnston Press has shed half of its journalists since 2009 with more than 1,000 jobs gone', *Press Gazette*, 11 January 2016, <http://www.pressgazette.co.uk/johnston-press-has-shed-half-its-journalists-2009-more-1000-jobs-gone>, <http://www.newsquest.co.uk/about> (accessed October 2015).

72 Sweney, M., 'Newsquest boosts profits while cutting more than 220 staff', *theguardian.com*, 9 October 2015, <http://www.theguardian.com/media/2015/oct/09/newsquest-boosts-profits-while-cutting-more-than-220-staff>.

74 National Union of Journalists, 'Roll call of newspaper closures and job losses', *National Union of Journalists.org.uk*, 9 June 2015, <https://www.NationalUnionofJournalists.org.uk/news/roll-call-of-newspaper-closures-and-job-losses>.

75 National Union of Journalists, 'Annus horribilis for photographers ends with yet more job cuts', *National Union of Journalists.org.uk*, 10 December 2014, <https://www.NationalUnionofJournalists.org.uk/news/annus-horribilis-for-photographers-ends-with-yet-more-job-cuts>.

76 Trinity Mirror, 'Trinity Mirror introduces new publishing operation', *Trinity Mirror*, 29 January 2013, <http://www.trinitymirror.com/pressrelease/trinity-mirror-introduces-new-publishing-operation/1868>.

77 Williams, A., 'Stop press? Crisis in Welsh newspapers and what to do about it', *Radical Wales*, 2011, <http://www.radicalwales.org/2011/10/stop-press-crisis-in-welsh-newspapers.html>.

78 Sweney, M., 'Daily Mail & General Trust cut more than 3,000 staff in the past four years', *theguardian.com*, 25 September 2012, <http://www.theguardian.com/media/2012/sep/25/daily-mail-general-trust-cut-staff>.

79 National Union of Journalists, 'Roll call of newspaper closures and job losses', *National Union of Journalists.org.uk*, 9 June 2015, <https://www.NationalUnionofJournalists.org.uk/news/roll-call-of-newspaper-closures-and-job-losses>.

80 Ibid

Decline in Specific Areas

There are individual areas of the UK where research shows a significant drop in the number of on-the-ground journalists. In Wales, Rachel Howells has analysed the number of editorial and production staff at two major newspaper publishers. At these two publishers the number dropped from almost 1,000 in 2002 to under 300 in 2015 (Figure 1).

In the town of Port Talbot the decline has been even sharper, particularly due to the closure of the *Port Talbot Guardian*. In ‘the 1960s,’ Howells writes, ‘up to 11 reporters worked across five newspapers, all of whom had offices in the town [of Port Talbot]; by the 2010s, two reporters worked the Neath and Port Talbot patch in combination, based in an office in Swansea ten miles away.’⁸¹

Figure 1: Number of editorial and production staff at Media Wales and South West Wales Media Ltd.



Maintaining profitability while cutting staff

Available data suggests that some local news publishers have maintained high or increasing profit margins during periods of significant cuts to editorial staff. In a 2010 analysis of Trinity Mirror’s regional subsidiary Media Wales, it was shown that between 1999 and 2008 the profit margin was frequently above 30 per cent during a period of substantial staffing cuts.⁸² Following this period (and the recession after the banking crisis of 2007-8), however, the picture is more complex, with profitability dropping to around 18 per cent in 2010 and 10 per cent in 2014, with a substantial loss in 2013 due to an impairment of intangible assets. 2013 aside, however, the business has remained profitable.⁸³

⁸¹ Howells, R., ‘Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper,’ PhD thesis, 2015, page 173, University of Cardiff.

⁸² Williams, A, ‘Unholy Trinity: The decline of Welsh news media,’ *openDemocracy*, 2010, <https://www.opendemocracy.net/ourkingdom/andy-williams/unholy-trinity-decline-of-welsh-news-media>.

⁸³ Companies House Annual Reports for Media Wales Ltd (company number 46946).

At Johnston Press, there has been a more consistent trend in recent years. As Table 2 shows, during a period in which editorial and photographic staff levels have decreased by over 40 per cent, the profit margin of the company has remained both relatively steady and high, rising over the period to over 20 per cent of revenue.⁸⁴

Precise figures for other local news organisations are difficult to ascertain, although over the two years of Local World's existence prior to its acquisition by Trinity Mirror, the company increased its operating profit from 8.0 per cent in 2013 to 10.2 per cent in 2014⁸⁵, while cutting production jobs from 1,117 to 1,015 – a reduction of around nine per cent

Table 2: Johnston Press profit margin and editorial staffing levels, 2010-14

Year	Profit margin	Editorial & photographic staff
2010	18.1%	1,993
2011	17.3%	1,913
2012	17.4%	1,786
2013	19.4%	1,577
2014	20.9%	1,133

The repercussions of the decline of the local print newspapers

Concentration of local newspaper ownership

Concern about the concentration of local newspaper ownership is similarly long-lived. In 1947 there were 116 daily newspapers published across the UK (including nationals). Slightly more than a third of these were owned by four news groups: Associated Newspapers, Kemsley Newspapers, the Westminster Press Group, and Provincial Newspapers.⁸⁶ According to Murdock and Golding the leading five companies increased their market share from 15 per cent to 43 per cent from 1921 to 1937.⁸⁷

In 1962, the second Royal Commission on the Press, the Shawcross Commission, decided that concentration of newspaper ownership 'could stifle the expression of opinion and argument and could distort the presentation of news.'⁸⁸ This finding led to the introduction of the Fair Trading Act (1973) that set stricter conditions on mergers of newspapers than on other entities, given their public interest role.

Continuing steady consolidation of the industry until the 1990s meant that by the early part of that decade over 60 per cent of the British local press was owned by the largest 10 companies.⁸⁹ There was then a sudden structural shift as new corporations entered the market and older groups sold their holdings. 'During 1996 ownership of one-third of all regional newspapers changed

⁸⁴ Johnston Press Annual Reports, <http://www.johnstonpress.co.uk/investors/reports-results-presentations>.

⁸⁵ Companies House Annual Reports for Local World Ltd (company number 8290481).

⁸⁶ Great Britain Royal Commission on the Press: Report, 1949, London: HMSO.

⁸⁷ Murdock, G., Golding, P., 'The structure, ownership and control of the press, 1914-76', in Boyce, G., Curran, J., Wingate P., *Newspaper history: from the 17th century to the present day*, 1978, London: Constable.

⁸⁸ Great Britain Royal Commission on the Press, 1961-1962: Report, 1962, London: HMSO.

⁸⁹ Franklin, B., Murphy, D., *Making the Local News: Local Journalism in Context*, 1998, London: Routledge.

hands.⁹⁰ Following this shift, 71 per cent of the market by circulation was in control of ten publishers.⁹¹

The Communications Act 2003 reduced the constraints on newspaper mergers, effectively removing small newspapers from most regulation, and stopping the requirement of prior consent for larger mergers.

By the time the House of Lord Communications Committee published its report on the ownership of news in 2008, it found four groups controlled over two-thirds of the local press:

‘The four biggest local and regional publishers are Trinity Mirror, the Daily Mail and General Trust (owner of Associated Newspapers and Northcliffe Media), Johnston Press and Newsquest Media Group. These four now have almost 70 per cent market share across the UK.’⁹²

By 2015, as this report shows below, the four largest local news publishers accounted for 73 per cent of all daily and weekly local newspapers in the UK, and the five largest accounted for 79 per cent.

In a previous era, one without digital competition, it might have been argued that having dominant providers with local news monopolies could enable investment in journalism and encourage broad, balanced coverage – as happened in many US cities in the 20th century. However, digital media has introduced new, non-news competitors to local news providers and militates against the US city news model of the last century. Moreover, as the evidence below shows, there are few signs that local news is moving in that direction.

Centralisation of reporting

Over the last decade most major newspaper groups have centralised some of their production, and left the city centre offices that they used to work from. There is no recent research recording the total number of city centre newspaper offices that have closed or been sold on in the last two decades. In 2010, however, the National Union of Journalists estimated that 54 local offices had closed since December 2008.⁹³

In some urban areas the number of offices dropped by a factor of four. In Birmingham, for example, the *Birmingham Post* and *Mail* plus their associated titles had 16 offices in 2000 and by 2010 were now down to four.⁹⁴ In Manchester the *Manchester Evening News* left its town centre offices for ‘a grim industrial estate in Oldham.’⁹⁵ In Dursley, the National Union of Journalists reports that some journalists are now expected to hold meetings in cafes.

In Port Talbot, the *Port Talbot Guardian* had an office in the town centre from when it was first published in 1925 until the late 1990s.⁹⁶ Indeed, as Howells writes, ‘In the 1970s, there were five newspapers with offices in Port Talbot,

90 Ibid.

91 Ibid.

92 House of Lords, Select Committee on Communications, ‘The ownership of the news: Volume 1 Report’, 27 June 2008, *HL Paper 122-I*, paragraph 162, <http://www.publications.parliament.uk/pa/ld200708/ldselect/ldcomuni/122/122i.pdf>.

93 Nel, F., ‘Updated: How many journalists are there in the UK?’, *For the Media*, 12 August 2010, <http://forthemedia.blogspot.co.uk/2010/08/how-journalists-are-there-in-uk-this-is.html>.

94 National Union of Journalists, ‘Roll call of newspaper closures and job losses’, 2015, <https://www.NationalUnionofJournalists.org.uk/news/roll-call-of-newspaper-closures-and-job-losses>.

95 Ponsford, D., ‘Regional press digital growth outstrips print decline as Manchester Evening News tops website table’, 26 August 2015, <http://www.pressgazette.co.uk/regional-press-digital-growth-outstrips-print-decline-manchester-evening-news-tops-website-table>.

96 Howells, R., ‘Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper,’ PhD thesis, 2015, page 173 University of Cardiff.

employing 10 or 11 journalists between them. By 2013 only the [Swansea Evening] Post was regularly providing coverage of Port Talbot's news, for which it employed two reporters to cover Neath and Port Talbot from its Swansea headquarters.⁹⁷

Some of the larger news groups have moved sub-editing of news to central production centres to save on cost. Newsquest, for example, has moved much of its sub-editing to two production centres at Newport and at Weymouth. Sub-editing for papers as far away as Blackburn and Warrington is done from Newport (150-200 miles), and parts of North London are sub-edited in Weymouth, approximately 140 miles away.⁹⁸ Trinity Mirror has a shared content unit in Liverpool.

The public want their local newspaper to be based locally, according to research conducted with the public in 2010. The report, commissioned by the Media Trust, states:

'People placed great importance on having the physical presence of a news organisation and of professional journalists in the actual locality so that they can build a relationship with them and feel that they are part of what they are covering.'⁹⁹

Once 'local news' is written, edited and published outside the community it loses much of its relevance, according to this research:

'Local news that operates out of premises removed from the local vicinity, with journalists who are out of touch with the communities they serve, ceases to be relevant to local people. And something very tangible is lost in the process...This was true for virtually all the participants in the focus groups in Long Eaton but was particularly marked for the elderly.'¹⁰⁰

It is not just the connection with journalists that is lost when the offices of local publishers move away. According to Howells, the move also has an impact on content: a content analysis of the *South Wales Evening Post* over four decades found evidence of 'a clear decline in the localness and diversity of sources, and an increase in the use of high status sources' over time, as the number of journalists dropped and the remaining journalists were based outside the local area.¹⁰¹

Less on-the-ground local reporting

A further repercussion of the decline in local newspaper circulations, revenues and staff has been a consequential reduction in on-the-ground local reporting, or 'beat' reporting as it is called in the US. The evidence available indicates that an increased proportion of the local journalists at the major news groups are office based and rely on content published online and press releases from public authorities and others. This is, said the chief executive of Local World, a necessary outcome of the changed business model. Local daily papers, Montgomery wrote in a memo to Local World staff, should be produced by 'a

⁹⁷ Ibid, page 280.

⁹⁸ Ponsford, D., 'Pay freezes, redundancies and subbing hubs see Newsquest staff across England hold strike votes', *Press Gazette*, 22 May 2014, <http://www.pressgazette.co.uk/pay-freezes-redundancies-and-subbing-hubs-see-newsquest-staff-across-england-hold-strike-votes>.

⁹⁹ Media Trust, *Meeting the news needs of local communities*, 2010, page 29, Goldsmiths Leverhulme Media Research Centre, <http://www.mediatrust.org/uploads/128255497549240/original.pdf>.

¹⁰⁰ Ibid.

¹⁰¹ Howells, R., 'Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper,' PhD thesis, 2015, page 217, University of Cardiff.

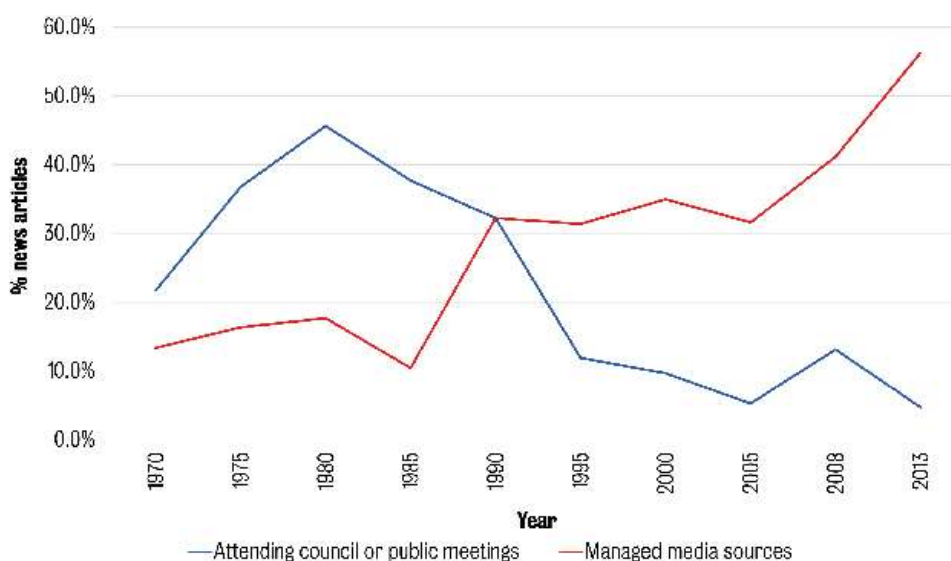
handful of content managers who will be office bound and will orchestrate all products across the platforms.’¹⁰²

There is also evidence to suggest there has been a steep decline in the independent reporting of councils, courts and other public authorities. This decline appears to have been going on for more than two decades. In 1998, Nick Davies wrote about the decline in court reporting, saying that ‘in the last twenty years, the nationwide network of court reporters which once provided blanket coverage has been slowly killed off’. Davies quotes a court reporter of 35 years experience:

‘We [court reporters] are a dying species. Nobody pays you. Local papers don’t even bother to cover the courts. That would have been sacrilege a few years ago. Undoubtedly we are missing many great stories. Court reporters are all but extinct’.¹⁰³

More recently, as part of the research for his 2015 paper, one of Keith Perch’s students interviewed 40 current and former court reporters: ‘Almost all of those asked, said that there were now fewer reporters in court than there were five years ago’.¹⁰⁴

Figure 2: News articles about public meetings



In Port Talbot, Rachel Howells has examined the effect that falling staff numbers had on attendance of reporters at council or other public meetings.

Howells found that, in Port Talbot, ‘journalists’ attendance at local council meetings, public meetings or political party meetings dropped from 45.6 per cent in 1980 to 4.7 per cent in 2013’. The proportion of stories based on attendance at council or public meetings fell as content from managed sources rose (Figure 2).¹⁰⁵

¹⁰² Ponsford, D, ‘Newspapers put together by one person ‘skimming online content’ - Montgomery’s leaked Local World vision document’, *Press Gazette*, 21 November 2013, <http://www.pressgazette.co.uk/local-world-newspapers-will-be-put-together-one-person-skimming-online-content-monty-outlines>.

¹⁰³ Davies, N., 1998, <http://www.nickdavies.net/1998/11/01/the-decline-of-the-court-reporter/>, referenced in Howells R., 2015.

¹⁰⁴ Perch, K., 2015, op.cit.

¹⁰⁵ Howells, R., ‘Journey to the centre of a news black hole: examining the democratic deficit in a town with no newspaper’, PhD thesis, 2015, page 198, University of Cardiff.

In some areas major news groups appear to have accepted they are no longer capable of performing the local reporting role as they were previously able to. 'The days are long gone' Trinity Mirror wrote to West Midlands staff in a memo in 2015, 'when we could afford to be a paper of record and dutifully report everything that happened on our patch.'¹⁰⁶

The owner of Local World, David Montgomery, has even envisioned a future without journalists, as he told the Culture, Media and Sport Select Committee:

'We cannot keep taking costs out but employing the same production techniques for print, we have to go truly digital, so that in three or four years from now I think that much of our human interface will have disappeared. In line with other digitised businesses, we will have to harvest content and publish it without a human interface, which will change the rules of journalists.'¹⁰⁷

Concern that the declining number of local journalists was leading to office-bound reporting and an increasing reliance on press releases again dates back over a decade. As early as 2002 Aeron Davis found a connection between falling staff numbers and the growth in the use of PR and agency copy.¹⁰⁸ In 2008 Nick Davies' *Flat Earth News* described the local newspaper as a 'news factory' in which journalists are expected to 'churn' out stories based on what they have been sent or what they have found on the web.¹⁰⁹ Davies' work was partly based on research done by Cardiff University.¹¹⁰

At around the same time research by O'Neill and O'Connor concluded that a 'combination of the pressures on journalists and the increased expertise in organisations' media relations' was leading to journalists 'becoming more passive, often merely passing on information to the public that they have been given' such that 'Too frequently the result is bland, banal copy at best; or free advertising and propaganda at worst.'¹¹¹ This research was conducted prior to the financial crisis, after which redundancies at most of the local news groups increased sharply.

Mounting evidence from across the UK strongly supports the claim that local councils, courts, public bodies and local businesses are being less attended and less reported on than they were, and that many local papers rely heavily on the information sent to them electronically. We do not yet know however, the extent of reporting from different local authorities across the UK, or the public affairs content being published across multiple different local news services.

¹⁰⁶ Greenslade, R., 'One Trinity Mirror sentence that spells the death knell of journalism', *theguardian.com*, 10 June 2015, <http://www.theguardian.com/media/greenslade/2015/jun/10/one-trinity-mirror-sentence-that-spells-the-death-knell-of-journalism>.

¹⁰⁷ Montgomery, D., 'Uncorrected Transcript Of Oral Evidence, Regulation Of The Press', Culture, Media And Sport Committee, 21 May 2013, question 484, <http://www.publications.parliament.uk/pa/cm201314/cmselect/cmcmds/uc143-i/uc14301.htm>.

¹⁰⁸ Davis, A., *Public Relations Democracy: Public Relations, Politics and the Mass Media in Britain*, 2002, Manchester: Manchester University Press.

¹⁰⁹ Davies, N., *Flat Earth News: An award-winning reporter exposes falsehood, distortion and propaganda in the global media*, 2008, London: Vintage.

¹¹⁰ Lewis, J., Williams, A., and Franklin, B., 'A Compromised Fourth Estate? UK news journalism, public relations and news sources', *Journalism Studies*, 2008, 9(1).

¹¹¹ O'Neill, D., O'Connor, C., 'The Passive Journalist', *Journalism Practice*, 2008, 2(3), 487-500.

News gaps

It is logical that the decline in the number of local print newspapers, and the significant drop in the number of professional local journalists, should mean that certain areas of the UK are less covered, or even not covered at all by local newspapers. As yet, however, there is not comprehensive research to show where or with what effect.

In 2012 *Press Gazette* sought to identify ‘news gaps’ – defined as areas of the UK that are ‘no longer covered by professional journalists’. Its map of news gaps (no longer available) identified areas that included: Port Talbot in Wales, Cannock Chase in Staffordshire and Long Eaton in Derbyshire, Rugeley in Lancashire, and Leominster in Herefordshire. Emily Shackleton updated the map in 2015 and found that ‘London is one of the least covered regions in the UK.’¹¹² Useful though these are, the maps are reliant on data that, this study has found, is not comprehensive or accurate, and do not go into detail as regards plurality of provision or content.

¹¹² Shackleton, E., ‘Map of UK’s local newspapers and websites reveals London news gap’, *Press Gazette*, 4 June 2015, <http://www.pressgazette.co.uk/map-uks-local-newspapers-and-websites-reveals-london-news-gap>.

Digital media – filling the gaps?

Local news sites – increasing online and mobile readership

The decline in circulation and revenues from local print newspapers contrasts with the rise of readership of local newspapers online and on mobile.

By mid-2015, according to the Audit Bureau for Circulation, Trinity Mirror regional news sites were gaining over two million unique users a day. Newsquest sites were being read by almost 1.3 million people, and Local World sites by 1.2 million. Johnston Press had slightly under a million a day.¹¹³

These figures represented a significant rise over the previous year. Between summer 2014 and summer 2015 UK regional newspaper websites increased their online unique audiences by, on average, over 30 per cent.¹¹⁴ Certain titles grew even faster, such as the *Liverpool Echo* and *Newcastle Chronicle*. Individual titles' websites, like the *Manchester Evening News* were attracting more than 700,000 unique browsers per day in mid-2015.¹¹⁵

Moreover the audiences to Johnston Press, Newsquest and Local World titles online had already grown substantially between 2012 and 2014 according to Enders Analysis.¹¹⁶ This has meant fast – relative – growth in digital revenue, prompting claims that local newspapers were successfully making the transition from print to digital news. The 'signs are encouraging that many traditional industry participants will be able to make this transition' to online and connected media.¹¹⁷

However, the increase in digital revenue has not matched the decrease in revenues from print. Trinity Mirror's print revenues in the first half of 2015, for example 'fell an estimated £29 million, while digital grew less than £4 million.'¹¹⁸ This is consistent across the industry, internationally as well as in the UK. Digital advertising and classified rates are lower than advertising and classified rates in print for the same publication.

An analysis of the figures for Johnston Press in recent years indicates the extent to which the substantial growth of digital revenue does not solve the problem of diminishing print revenue. Table 3 and Figure 3 show that, while digital revenue at the company grew by some 57 per cent over five years – over £10 million – this did not do much to offset a reduction in print revenue of over £117 million.¹¹⁹

¹¹³ Ponsford, D., 'Regional press digital growth outstrips print decline as Manchester Evening News tops website table', *Press Gazette*, 26 August 2015, <http://www.pressgazette.co.uk/regional-press-digital-growth-outstrips-print-decline-manchester-evening-news-tops-website-table>.

¹¹⁴ Ibid.

¹¹⁵ Ponsford, D., 'The survival of UK regional dailies and their digital growth is the great escape story of the media downturn', *Press Gazette*, 27 August 2015, <http://www.pressgazette.co.uk/content/survival-uk-regional-dailies-and-their-accelerating-digital-growth-great-escape-story-media>

¹¹⁶ Oliver and Ohlbaum, 'UK news provision at the crossroads: The news market in the 21st Century and the likely implications for the BBC's role', a report for the *News Media Association*, September 2015, p40, http://www.newsmediauk.org/write/MediaUploads/PDFper cent20Docs/OandO_NMA_-_UK_news_provision_at_the_crossroads.pdf.

¹¹⁷ Ibid.

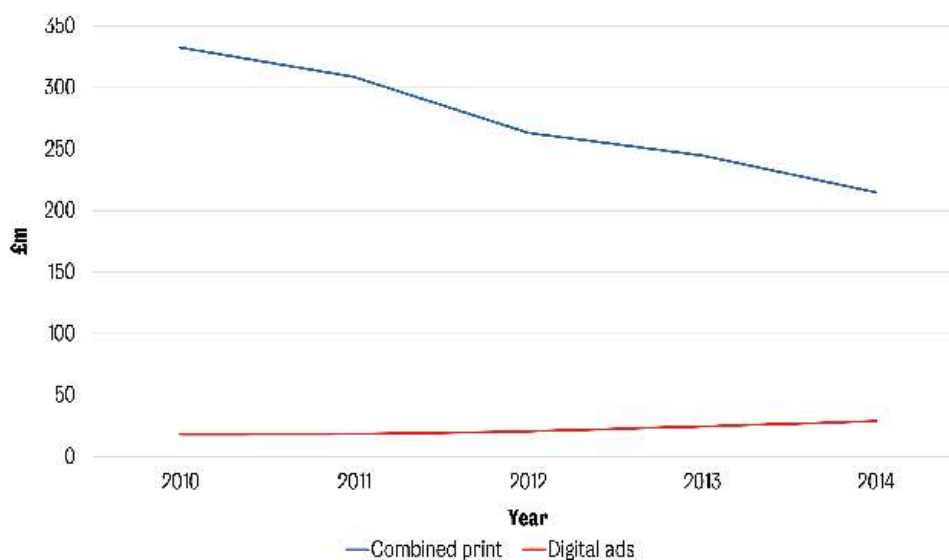
¹¹⁸ Mance, H., 'All news is local but UK groups struggle to profit from it', *FT.com*, 17 July 2015, <http://www.ft.com/cms/s/0/b4c85b58-2c75-11e5-acfb-cbd2e1c81cca.html#axzz3uEfXP9zO>.

¹¹⁹ All figures from Johnston Press PLC annual reports.

Table 3: Johnston Press print vs digital revenue change, 2010-14

Year	Print Ads (£m)	Sales (£m)	Combined Print (£m)	Digital Ads (£m)
2010	235.8	96.7	332.5	18.3
2011	212.9	95.6	308.5	18.4
2012	173.5	89.6	263.1	20.6
2013	157.1	87.7	244.8	24.6
2014	136.9	77.9	214.8	28.8

Figure 3: Johnston Press print vs digital revenue change, 2010-14



Moreover, according to journalists responding to a 2015 *Press Gazette* survey, the shift to digital at certain large publishers has been accompanied by a drive for audiences, at the cost of public interest news.¹²⁰

‘Pressure from management for web clicks over good journalism [is a problem],’ said one survey respondent from Local World. Another wrote that ‘The clickbait culture is also a concern in that it appears to be starting to affect what stories appear on the front page, which has resulted in some questionable splashes of late.’ A news editor wrote in response to the survey: ‘Ownership/senior management’s disgusting disinterest in actual news and production of a quality product in favour of pointless clickbait listicles/galleries for morons.’ A journalist from the North West of England journalist said: ‘I wanted to be a journalist to uncover corruption, inform the public and make people accountable. Editors aren’t interested in those stories any more - they prefer Z list celebs with their boobs out because it gets more website hits.’¹²¹

¹²⁰ Turvill, W., ‘Five years ago I loved it, now I’m quitting!’ Local journalism survey reveals pay, security and clickbait concerns’, *Press Gazette*, 21 September 2015, <http://www.pressgazette.co.uk/five-years-ago-i-loved-it-now-im-quitting-survey-regional-journalists-reveals-concerns-over-pay>.

¹²¹ Ibid.

In June 2015 Trinity Mirror told staff that they would be given audience growth targets.¹²² This led to strong criticism, including from all four political parties in the Welsh Assembly.¹²³ Trinity Mirror rejected accusations that it was encouraging clickbait, saying that ‘We won’t just be measuring page views and unique users – we’ll be looking at engagement as well.’¹²⁴

Separate to the dispute over ‘clickbait’, there is no quantitative evidence that shows whether reporting of news of local public affairs has increased or decreased. Yet none of the major news groups has announced plans to increase the number of journalists reporting on local public interest news. Indeed, Trinity Mirror announced that they would continue an aggressive cost-cutting programme through 2015.¹²⁵ Questions around democratic deficit are therefore far from resolved by the growth in digital.

The development of hyperlocal news

In October 2015 the Carnegie UK Trust published research identifying 550 hyperlocal news sites in the UK.¹²⁶ These sites range considerably in scale and ambition, from established sites like *OnTheWight.com* to electronic noticeboards like *charlbury.info*. They are not spread evenly across the UK. Some areas, such as around Birmingham, have numerous hyperlocals. Other areas, such as Northern Ireland, have few or none (Carnegie UK Trust identifies three in Northern Ireland).

Recent research has shown that many of these sites are performing valuable civic functions, similar to those previously played by local newspapers.¹²⁷ A survey of 183 UK hyperlocal sites conducted in 2014 found that 75 per cent had covered local businesses in the last two years, 79 per cent had covered local government planning issues, and 81 per cent had covered local council meetings. ‘Seven out of ten producers’ the same survey discovered, ‘see what they do as a form of active community participation, over half see it as local journalism, and over half as an expression of active citizenship’.

However, significant questions remain regarding their sustainability, their reach, and their capacity to fulfill the role previously played by many local newspapers. Just under two-thirds of hyperlocals that responded (from a total of 171) funded their running costs themselves, while only 28 per cent earned enough revenue from their service to cover costs.¹²⁸ Hyperlocals’ lack of resources makes it difficult for them to commit to perform democratic functions of the Fourth Estate such as regularly reporting from local council meetings, from local courts, or other public services. This is similar to the situation in the US and Sweden where, due to limited resources, these sites are currently ‘imperfect substitutes at best for most newspapers when it comes to local government coverage.’¹²⁹

122 Ponsford, D., ‘Journalists to be given personal online audience growth targets after job cuts at Trinity Mirror Midlands’, *Press Gazette*, 9 June 2015, <http://www.pressgazette.co.uk/journalists-be-given-personal-online-audience-growth-targets-after-job-cuts-trinity-mirror-midlands>.

123 Knowles, D., ‘All four political parties in Welsh Assembly condemn individual audience targets for journalists’, *Press Gazette*, 16 September 2015, <http://www.pressgazette.co.uk/all-four-political-parties-welsh-assembly-condemn-individual-audience-targets-journalists>.

124 Ibid.

125 Trinity Mirror, ‘Trinity Mirror introduces new publishing operation’, *Trinity Mirror*, 29 January 2013, <http://www.trinitymirror.com/pressrelease/trinity-mirror-introduces-new-publishing-operation/1868>.

126 Carnegie UK Trust, ‘New hyperlocal news directory launched by Carnegie UK Trust’, 14 October 2015, <http://www.carnegieuktrust.org.uk/news--events/latest/new-hyperlocal-news-directory-launched-by-carnegie>.

127 Williams, A., Barnett, S., Harte, D., Townend, J., ‘The State of Hyperlocal Community News in the UK: Findings from a survey of practitioners’, *AHRC*, July 2014, <https://hyperlocalsurvey.files.wordpress.com/2014/07/hyperlocal-community-news-in-the-uk-2014.pdf>.

128 Barnett, S., Townend, J., ‘Plurality, Policy and the Local: Can hyperlocals fill the gap?’, *Journalism Practice*, 2015, 9 (3)

129 Fico, F., Lacy, S., Wildman, S. S. et al., ‘Citizen journalism sites as information substitutes and complements for United States newspaper coverage of local governments’, *Digital Journalism*, 2013, 1: 152-168; Holt, K., Karlsson M., ‘Random acts of journalism?’: How citizen journalists tell the news in Sweden’, *New Media and Society*, 2014, 17(11) 1795-1810.

There are still less than half as many hyperlocals as local newspapers – 550 as compared to 1,112 local newspapers. For the most part they cover a much smaller catchment area than a local newspaper. Hyperlocals appeared to grow quickly in number between 2010 and 2013 from 295 sites in 2010 to 499 sites in 2013 according to Ofcom. Though then declined in 2014 to 408 and increased again in 2015.¹³⁰

Although research indicates that hyperlocals are beginning to perform an important democratic function, their reach and impact remains limited, and the extent of their sustainability is unclear.

The localisation of the new tech giants

Local news groups increasingly see their competitors as the global tech giants rather than news media rivals. “With competition from Google and Facebook” Simon Fox said in 2015, “we [Trinity Mirror] need to be able to build bigger and better digital products for our readers and advertisers...Scale is very important”.¹³¹

Both Google and Facebook, and Amazon, have created services to appeal to local advertisers. These include Google My Business, Facebook Local Awareness Ads, and Amazon Local. Unlike many local news services, some of these global technology companies are aware of their users’ location and can serve advertisements accordingly. Google can track people’s movements via their use of its services on their phone, as can Facebook.¹³² Apple also tracks its users’ movements via their iPhones, though says the information only ever remains on the hardware.¹³³ In each case you can disable the tracking. This makes these services highly attractive to local advertisers.

Yet, though these technology companies are competing with local news providers for advertising, they do not themselves report on local news. They enable others to publish information on their services that may or may not be considered ‘local news’, but the organisations themselves do not perform – or aspire to perform – the democratic functions of the local press (as set out above).

Nor is there evidence to suggest that the gaps left by the decline in the local press are being filled by the public via these technology platforms. Some of the gaps are starting to be filled by hyperlocal news services, many of which rely on these technology platforms, though as set out above, there are significant questions about their reach, impact and sustainability. Authorities are also using the technology platforms, for example to alert travellers to transport disruptions. This does not, however, constitute independent reporting of local public affairs.

Local newspapers, in print and online, therefore remain central to performing the democratic functions we have come to expect. Yet the evidence suggests that the extent to which they are performing these functions has declined,

¹³⁰ Ofcom, *Internet Citizens 2013*, 5 November 2013, <http://stakeholders.ofcom.org.uk/market-data-research/other/telecoms-research/internet-citizens-2013>.

¹³¹ Sweney, M., ‘Trinity Mirror confirms \$220m Local World Deal’, *The Guardian*, 28 October 2015, <http://www.theguardian.com/media/2015/oct/28/trinity-mirror-local-world-deal>.

¹³² Google, ‘Welcome to the Google Privacy Policy’, August 2015, <http://www.google.com/policies/privacy>; Fowler, G. A., ‘What You Can Do About Facebook Tracking’, *wsj.com*, August 2014, <http://www.wsj.com/articles/what-you-can-do-about-facebook-tracking-1407263246>.

¹³³ Waterson, J., ‘Your iPhone Knows Exactly Where You’ve Been And This Is How To See It’, *Buzzfeed*, April 2014, <http://www.buzzfeed.com/jimwaterson/your-iphone-knows-exactly-where-youve-been-and-this-is-how-t>.

and that serious gaps are emerging. The next section looks at how existing government policies and the extent to which they seek to address these democratic issues.

Failure of public policy to address concerns

Although the UK government supports a number of interventions in local news provision, it is not clear that any of them is aimed explicitly at addressing an actual or perceived democratic deficit as a consequence of the decline in local news. Nor is the UK government currently conducting research to establish whether there is, or is not, a democratic deficit. On the basis of its actions therefore, the government does not appear to share concerns raised by journalists, academics, the National Union of Journalists, parts of the trade press, the BBC and civil society groups about the decline of local newspapers and its implications for democracy.

Current public policy interventions

Local TV

The most recent and significant public policy intervention at a local level is in Local TV. In 2011 the Coalition government announced its plans for Local TV, to be broadcast on the Freeview platform (Channel 8), and subsidised it with £40 million of unspent BBC digital switchover funds and a prominent electronic program guide position for local TV stations.¹³⁴ By spring 2015, 33 licenses had been issued and 17 stations were broadcasting.¹³⁵

There is currently no indication that these local television services will address the problem of democratic deficit, as outlined in this report. All of these were located in urban areas, 90 per cent of which already have a daily local newspaper. There are 17 local TV stations broadcasting, but 406 LADs in the UK. Whether or not these stations are performing a valuable democratic function (which is contested), there is no indication that these Local TV stations will address the localities that, on the evidence found for this report, may be suffering from a democratic deficit.

Statutory notices

Local newspapers benefit from mandatory local advertising of statutory notices by the government. They have benefitted from such notices for many years. This equates to a subsidy of approximately £26 million a year, according to research by the Local Government Association.¹³⁶ The same research found that Councils spend a further £18 million a year on other advertising and printing/distribution contracts in local newspapers. There is no formal link between the money received by local newspapers and provision of public interest news. Hyperlocal sites and other local news providers are not eligible for statutory notices.

¹³⁴ Dacre, N., Speech at the Westminster Media Forum seminar on local media, 21 April 2015, <http://inclusivedigital.tv/blogs/full-text-of-westminster-forum-keynote-speech>.

¹³⁵ Ofcom, 'Ofcom announces local TV licenses for Aberdeen, Ayr and Dundee', 19 March 2015, <http://media.ofcom.org.uk/news/2015/aberdeen-ayr-dundee>, and 'Local TV Broadcasters', <http://licensing.ofcom.org.uk/tv-broadcast-licences/current-licensees/local-tv/> (accessed December 2015).

¹³⁶ Local Government Association, 'Councils forced to waste millions on public notices', 26 June 2013, http://www.local.gov.uk/media-releases/-/journal_content/56/10180/4042880/NEWS.

The Coalition government (2010-15) ran a pilot project from March to August 2015 to explore ways to ‘make statutory notices fit for the future’. This included funding for 24 pilot projects, mostly between councils and local newspaper groups.¹³⁷ The policy outcome of this pilot scheme, or whether it will lead to a change in policy, is not yet clear. Should the system of statutory notices be reformed, it would be possible to target the funds towards greater reporting of local public affairs.

VAT subsidy

HMRC estimates the cost of zero-rated VAT on books, newspapers and magazines for the year 2014-15 as approximately £1,650 million.¹³⁸ When Timo Toivonen calculated the total value of this for UK paid-for newspapers in 2008 – when the estimated cost of zero-rated VAT was £1,700 million – it was £594 million.¹³⁹ If this figure is reduced in proportion with the 2014-15 HMRC cost, that would give a VAT newspaper subsidy figure for 2014-15 of £577 million. This is, however, a speculative figure and an accurate estimate would require further research. No such subsidy exists for digital news. There is no formal link between the zero-rated VAT and provision of public interest news.

Community radio

Ofcom administer a ‘Community Radio Fund’ for Department for Culture, Media and Sport that makes small grants to local community radio projects. The Department for Culture, Media and Sport allocated £393,000 for the ‘Community Radio Fund’ for 2014-15, with grants averaging around £15,000.¹⁴⁰ This is a tiny fraction of the government’s overall intervention in local media, and represents a significant drop from when the fund first started in 2005, when 14 licensees shared £500,000.¹⁴¹

Freedom of information and open data

The Freedom of Information Act (2000) (FOI) came fully into force in 2005. In 2014 central government bodies received a total of 46,806 requests.¹⁴² Following the election success of the Conservative party in May 2015, the government set up a review of FOI to establish whether the burden imposed on public authorities by the Act was justified by the public interest in the public’s right to know. The nature of the review suggested changes were being considered that would make FOI less accessible, for example by introducing a fee for use. This would have a disproportionately harmful effect on the media given they are amongst the primary users of the Act.¹⁴³ Local media have particularly benefitted, the publisher of *HoldtheFrontPage* stating that FOI has become ‘an essential tool for journalists on local and regional newspapers’.¹⁴⁴

137 DCLG, ‘New wave of innovation to update statutory notices for 21st Century’, 13 March 2015, <https://www.gov.uk/government/news/new-wave-of-innovation-to-update-statutory-notices-for-21st-century>.

138 HMRC, ‘Estimated Costs of the Principal Tax Expenditures and Structural Reliefs’, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/389539/20141231_expenditure_reliefs_v0.3.pdf.

139 Nielsen, R.K., Linnebank, G., *Public Support for the Media: A Six-Country Overview of Direct and Indirect Subsidies*, 2011, Oxford: Reuters Institute for the Study of Journalism.

140 Ofcom, ‘Community Radio Fund: award of grants for 2014/15 – Round 2’, 9 February 2015, <http://stakeholders.ofcom.org.uk/broadcasting/radio/community-radio-fund/14-15-awards-round-2>.

141 Buckley, S., ‘Community radio in funding crisis’, *theguardian.com*, 24 August 2009.

142 Ministry of Justice, *Freedom of Information Statistics: Implementation in Central Government*, April 23 2015, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/423487/foi-statistics-oct-dec-2014-annual.pdf.

143 ICO, ‘Response to Independent Commission on Freedom of Information’, 16 November 2015, <https://ico.org.uk/media/about-the-ico/consultation-responses/2015/1560175/ico-response-independent-commission-on-freedom-of-information.pdf>.

144 Linford, P., ‘Editors launch ‘hands off FoI’ campaign’, *HoldtheFrontPage.co.uk*, 19 October 2015, <http://www.holdthefrontpage.co.uk/2015/news/editors-launch-hands-off-foi-campaign>.

In 2011 the Coalition government published 'The Code of Recommended Practice for Local Authorities on Data Transparency' in order to 'extend transparency and to place more power into citizens hands', to 'increase democratic accountability' and to provide the information necessary 'for local people and groups to participate in local decisions about how services are delivered.'¹⁴⁵ The Code was updated subsequently when it was found to have been adhered to inconsistently. At around the same time the government created an Open Government License and developed *data.gov.uk*.

As a consequence the UK was considered to be ahead of many other countries in making government data available and re-useable. Yet, three years after its release, there was still limited evidence that the data was being used to hold local government to account. In reference to the many data sets on *data.gov.uk* the Public Administration Committee said that 'Simply putting data "out there" is not enough to keep Government accountable.'¹⁴⁶

The BBC and local News

The BBC provides radio, television and text-based news (online) targeted at nations and regions in the UK. The BBC spent £115.6 million on content in local radio in England in 2014-15. It spent £17.3 million on content for radio in Northern Ireland, £25.4 million on radio in Scotland and £26.9 million on radio in Wales. This adds up to just over £185 million.¹⁴⁷

These BBC services would be better termed regional than local since there are a total of 50 across England, Scotland and Wales, as compared to 380 LADs. In other words, There is one BBC local service for every seven LADs.

Additional local services proposed by the BBC in the last decade – such as a local video service – have been rejected by the BBC Trust following assessment of the proposal, and after strong lobbying by the local press.¹⁴⁸

Summary

Of these policy interventions only Local TV and Open Data have been introduced within the last decade. The rest are longstanding and were not introduced in order to facilitate the transition of local news from analog to digital or to address issues arising from the decline of the local press. Neither were the two recent interventions, Local TV and Open Data, introduced to address directly the problem of a democratic deficit resulting from a decline in the provision of independent local news about public affairs.

None of the subsidies provided by these policy interventions is accessible to new and emerging digital news sources such as hyperlocals. This despite evidence that they are starting to report public interest local news but may not be economically sustainable.¹⁴⁹

The next section maps local news provision in 2015 – as provided by local newspapers, local TV and hyperlocal sites – and shows where these gaps are emerging, and the degree to which concentration of ownership is impacting plurality.

¹⁴⁵ DCLG, 'Local Government Transparency Code 2014 Impact Assessment', June 2014, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/326686/Local_Government_Transparency_code_2014_-_JA.pdf.

¹⁴⁶ Public Administration Committee, 'Statistics and Open Data: Harvesting unused knowledge, empowering citizens and improving public services', *Tenth Report*, 11 March 2014, <http://www.publications.parliament.uk/pa/cm201314/cmselect/cmpubadm/564/56402.htm>.

¹⁴⁷ BBC, *Annual Report and Accounts 2014/15*, 2015, <http://downloads.bbc.co.uk/annualreport/pdf/2014-15/bbc-annualreport-201415.pdf>.

¹⁴⁸ BBC Trust, 'BBC Trust rejects local video proposals', 21 November 2008, http://www.bbc.co.uk/bbctrust/news/press_releases/2008/local_video_prov.

¹⁴⁹ Williams, A., Harte, D., Turner, J., 'The Value of UK Hyperlocal Community News', *Digital Journalism*, 2015, 3:5, 680-703.

Mapping local news provision – a snapshot in 2015

Local newspaper concentration in the UK, 2015

A primary function of this project is to compile a complete list of all local daily and weekly newspapers available in the UK. While the fast pace of consolidation within the local news industry means that the overall total will fluctuate over time as titles are merged, closed and opened, the research here uses a snapshot of all titles available towards the end of 2015. Online-only newspapers are included, where known – these were largely obtained from the digital brand lists of the major publishers.

The full list of titles gathered for the report is available at a special microsite.¹⁵⁰ The process for creating the list is set out in full in the Methodology section of this report. The list of newspapers aggregated in Table 4 was produced by combining a number of information sources, including the brand lists of the publishers themselves. The list also counts all individual separate titles of newspapers, which can often be grouped in industry databases and in the publishers' brand lists

Table 4: UK local newspapers (November 2015), by publisher

Publisher	Titles	Share of total	Cumulative share
Trinity Mirror Regionals Ltd	237	21.3%	21.3%
Johnston Press PLC	233	20.9%	42.2%
Newsquest (Gannett UK Ltd)	212	19.1%	61.3%
Tindle Newspapers Limited	126	11.3%	72.6%
Archant	74	6.7%	79.3%
- Remaining 58 Publishers	230	20.7%	100.0%
Total	1112	100.0%	

Table 4 shows that the local newspaper market in the UK is highly concentrated, with Trinity Mirror and Johnston Press each owning more titles than the 58 smallest publishers. Just five companies own almost four-fifths of all local daily and weekly newspapers, which is in stark comparison with the 1947 Royal Commission on the Press, which arose in part due to concerns that five companies owned 43 per cent of the local newspaper market.

¹⁵⁰ <http://www.localnewsmapping.uk>.

The figures here have changed even from the most recent report on UK media ownership, published in October 2015.¹⁵¹ Trinity Mirror's purchase of the remainder of Local World (and all but 10 of its titles) in late October 2015 mark the biggest consolidation in local news in a decade. This followed the purchase of Romanes Media Group by Newsquest in May 2015.

Given the fluidity of the local newspaper market, it is expected that the figures produced here will have a finite shelf life. The online dataset is intended to form the basis of an updateable list of titles, with this report forming the first stage of a review of trends in local news provision.

Mapping local news coverage

This section contains a series of maps showing the extent of local newspaper coverage within the UK, including:

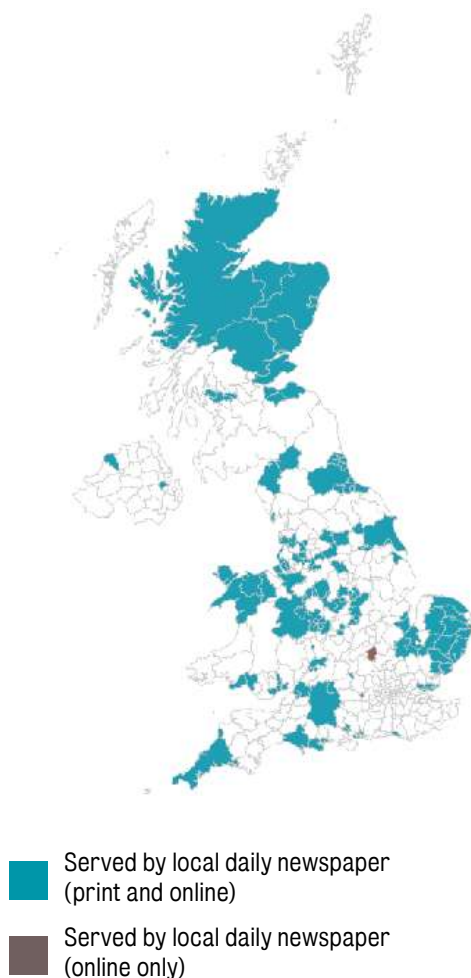
- coverage by daily and weekly local newspapers
- areas with dominant publishers, including dominance by specific news groups
- the impact of the Trinity Mirror – Local World deal on plurality of news provision
- the distribution of hyperlocal news sites and local television franchises relative to daily local news coverage.

Maps 1, 2, 3 and 14 are based on a combination of the list of local newspaper titles generated for this study, and newspaper industry databases. They are therefore able to draw conclusions about coverage in Northern Ireland, and therefore cover all 406 LADs in the UK. The remaining maps are based on circulation data from the Local Media World/JICREG and MediaTel databases. They therefore do not include sufficient data for Northern Ireland, and all figures are derived from the 380 LADs in England, Scotland and Wales.¹⁵²

¹⁵¹ Media Reform Coalition, 'Who Owns the UK Media?', October 2015, http://www.mediareform.org.uk/wp-content/uploads/2015/10/Who_owns_the_UK_media-report_plus_appendix1.pdf

¹⁵² An explanation of the use of circulation as a metric for newspaper coverage is included in the Methodology section.

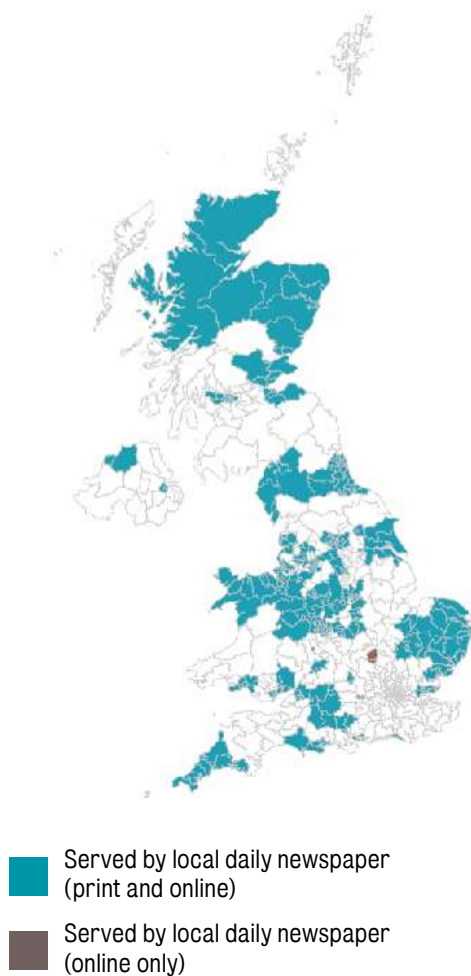
Map 1: Local Authority Districts served by a local daily newspaper or local daily news website (previously daily print newspaper)



- The majority of the UK is not served by a local daily newspaper. 56.1 per cent of the UK population live in areas not served by a local daily. Rural areas are particularly poorly served, with almost all local daily papers covering major urban areas.
- In total, 271 of 406 LADs in the UK (66.8 per cent) are not served by a dedicated local daily newspaper. 82 LADs are directly served, and 53 are covered by local dailies based in adjacent or nearby LADs.
- Areas that are particularly underserved by local daily newspapers are: the south-east of England, Devon & Somerset, middle England (Warwickshire, Oxfordshire, Cambridgeshire, Lincolnshire, Nottinghamshire, Bedfordshire, Buckinghamshire), Central and Southern Wales.
- Local daily papers are overwhelmingly located in major urban areas. Rural or semi-rural areas with daily local news coverage tend – with some exceptions – to be covered by metropolitan titles (eg Aberdeenshire and Moray covered by the Aberdeen-based *Press and Journal*).
- London has the *Evening Standard*, but since this serves a population of over 8.5 million people it is more equivalent to a national paper than a local paper covering news at a community level. Many of the London boroughs receive relatively little dedicated coverage in the *Evening Standard*.¹⁵³

¹⁵³ In the month of October 2015, many London boroughs received less than one article per day, including Merton, Hounslow and Redbridge. See Methodology section for details.

Map 2: Parliamentary constituencies served by a local daily newspaper or local daily news website (previously daily print newspaper)



- Over half of the UK's Parliamentary constituencies, 330 out of 650, are not covered by a daily local newspaper.
- 206 of these 330 constituencies received 5 or fewer mentions in national press and broadcast news coverage of the 2015 general election campaign (See Map 14 below).
- 6 constituencies (33%) in Northern Ireland have local daily newspaper coverage
- 23 constituencies (58%) in Wales have local daily newspaper coverage
- 34 constituencies (58%) in Scotland have local daily newspaper coverage
- 280 constituencies (48%) in England have local daily newspaper coverage
- Amongst those constituencies without a daily local newspaper are: Witney (the PM's constituency), Maidenhead (the Home Secretary's constituency), Runnymede and Weybridge (the Foreign Secretary's constituency), Maldon (the constituency of the Culture Secretary).

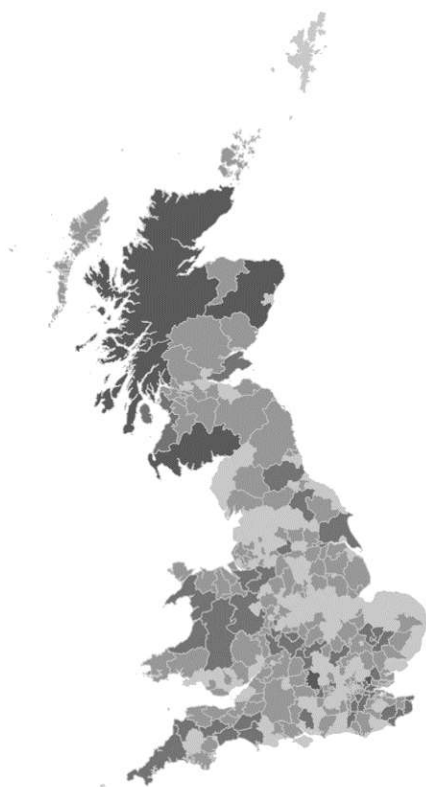
Map 3: Local Authority Districts served by a local weekly newspaper



- ♦ Weekly newspapers do cover the overwhelming majority of the UK. Only one LAD – the City of London – is not served by a weekly or daily local newspaper.

 Served by local daily newspaper

Map 4: Local Authority Districts by number of publishers



- ♦ 6 (1.6 per cent) of 380 LADs in Scotland, England and Wales have four publishers or more of local papers. Four of these – Aberdeenshire, Dumfries & Galloway, Argyll and Bute, and Highland – are in Scotland.
- ♦ 47 (12.4 per cent) of LADs are served by three publishers.
- ♦ 61 (42.3 per cent) of LADs are served by two publishers.
- ♦ 165 (43.4 per cent) of LADs are served by a single publisher.
- ♦ 1 LAD (City of London) is not served by any publishers.

 0 publishers
 1 publisher
 2 publishers
 3 publishers
 4 publishers

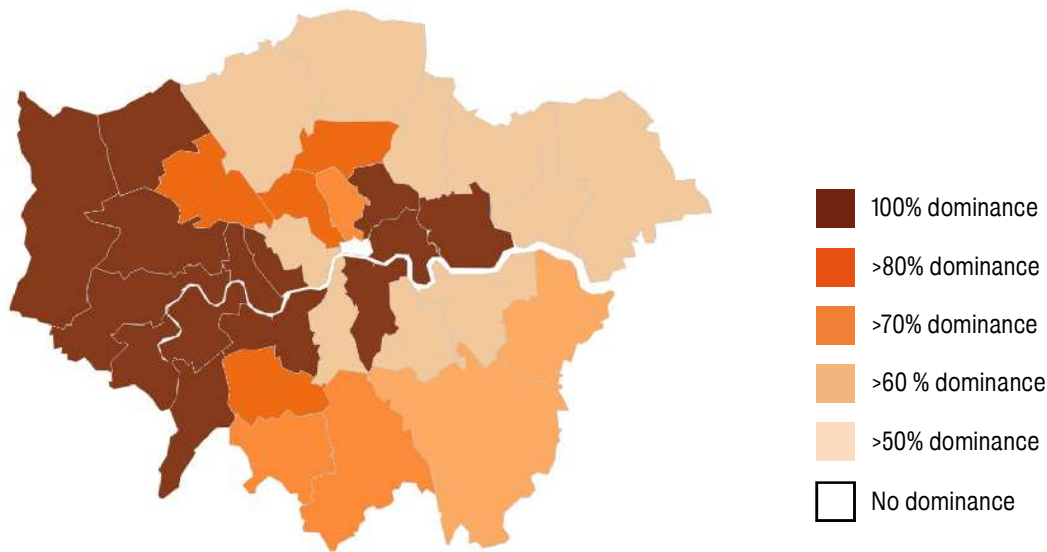
Map 5: Local Authority Districts without a dominant publisher



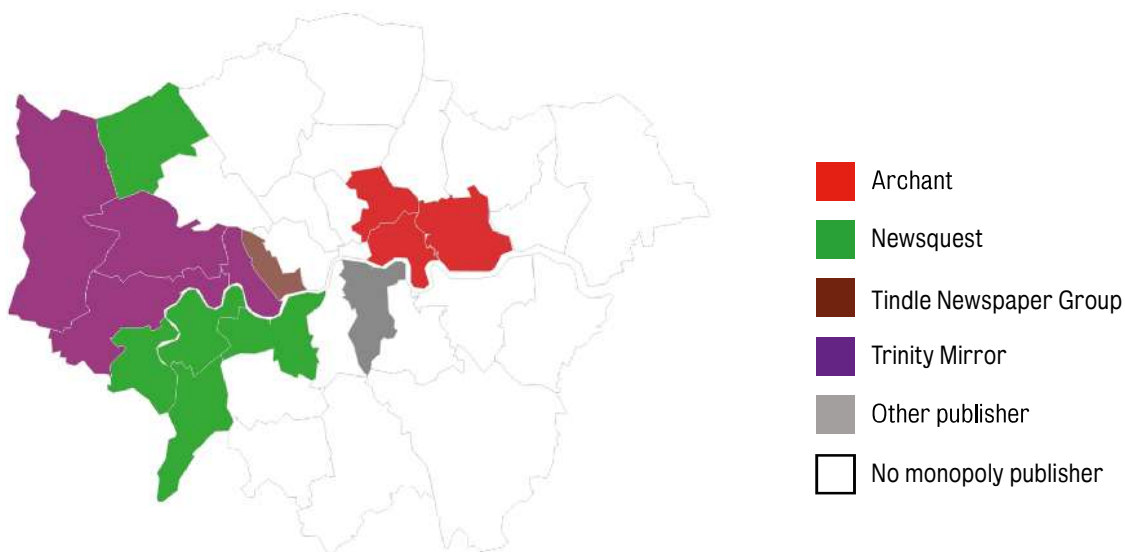
- 17 (4.5 per cent) of 380 LADs in Scotland, England and Wales do not have a dominant publisher – that is, where the largest publisher accounts for less than 50 per cent of total circulation.
- 363 (95.5 per cent) have a dominant publisher of daily and weekly local newspapers.
- 262 (68.9 per cent) have a dominant publisher with more than 70 per cent share of circulation.

 No dominant publisher

Map 6a: Dominance of publishers in Greater London

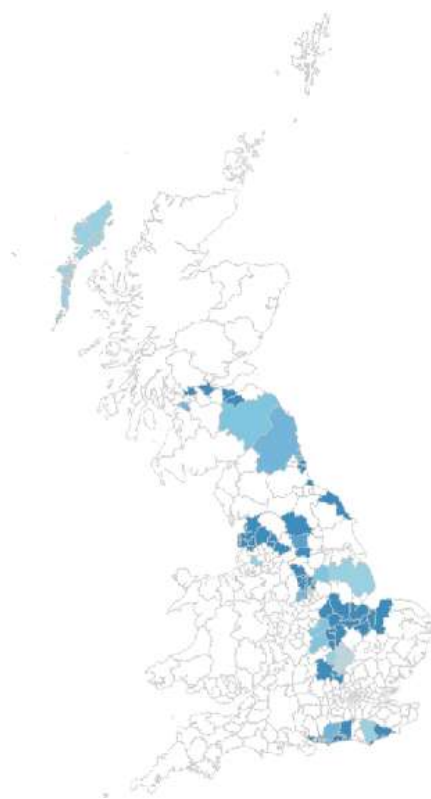


Map 6b: Monopoly publishers in Greater London

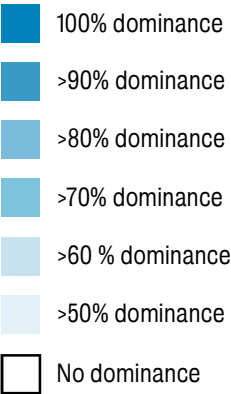


- Of the 32 boroughs within Greater London served by a local newspaper, all have a dominant publisher
- 20 LADs (62.5 per cent) have a publisher with greater than 70 per cent share
- 13 LADS (40.6 per cent) have a monopoly publisher – these are mainly in west London and include Hounslow, Ealing, Hammersmith and Fulham, Kensington and Chelsea, Richmond-Upon-Thames and Kingston-Upon-Thames
- Trinity Mirror has a monopoly in four Greater London LADs (Hillingdon, Ealing, Hounslow, Hammersmith and Fulham)
- Newsquest has a monopoly in four Greater London LADs (Harrow, Richmond-Upon-Thames, Kingston-Upon-Thames, Wandsworth)
- Archant has a monopoly in three Greater London LADs (Hackney, Tower Hamlets and Newham)
- Tindle has a monopoly in one Greater London LAD (Kensington and Chelsea)

Map 7: Local Authority Districts dominated by Johnston Press



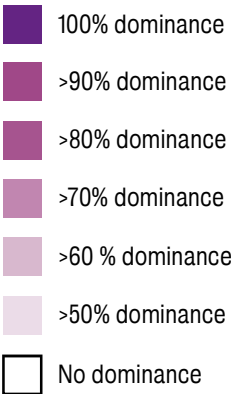
- Johnston Press has dominance in 70 LADs
- Its dominance stretches north to south from Falkirk to Eastbourne
- It has particular dominance in East Midlands, North England, Scottish Borders and parts of Scotland (incl. Western Isles) and South East England.



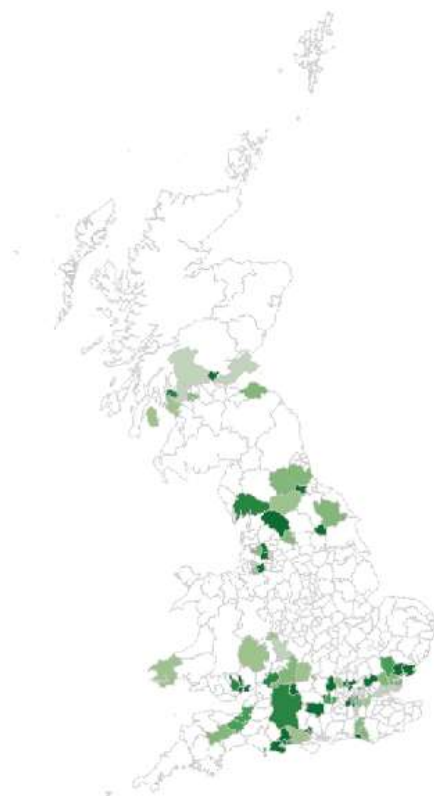
Map 8: Local Authority Districts dominated by Trinity Mirror



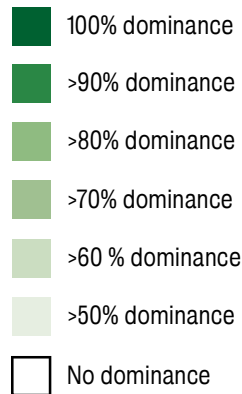
- Trinity Mirror has dominance in 90 LADs
- Its dominance stretches from Perth and Kinross to Cornwall
- It has particular dominance in the Midlands, south Wales, Yorkshire, Somerset, Surrey and southern parts of Scotland



Map 9: Local Authority Districts dominated by Newsquest



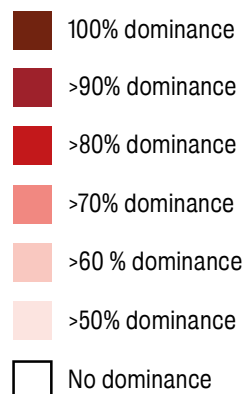
- Newsquest has dominance in 88 LADs
- It has particular dominance in Greater London, the Home Counties, and parts of southern England, as well as parts of the North West and the Central Belt in Scotland.



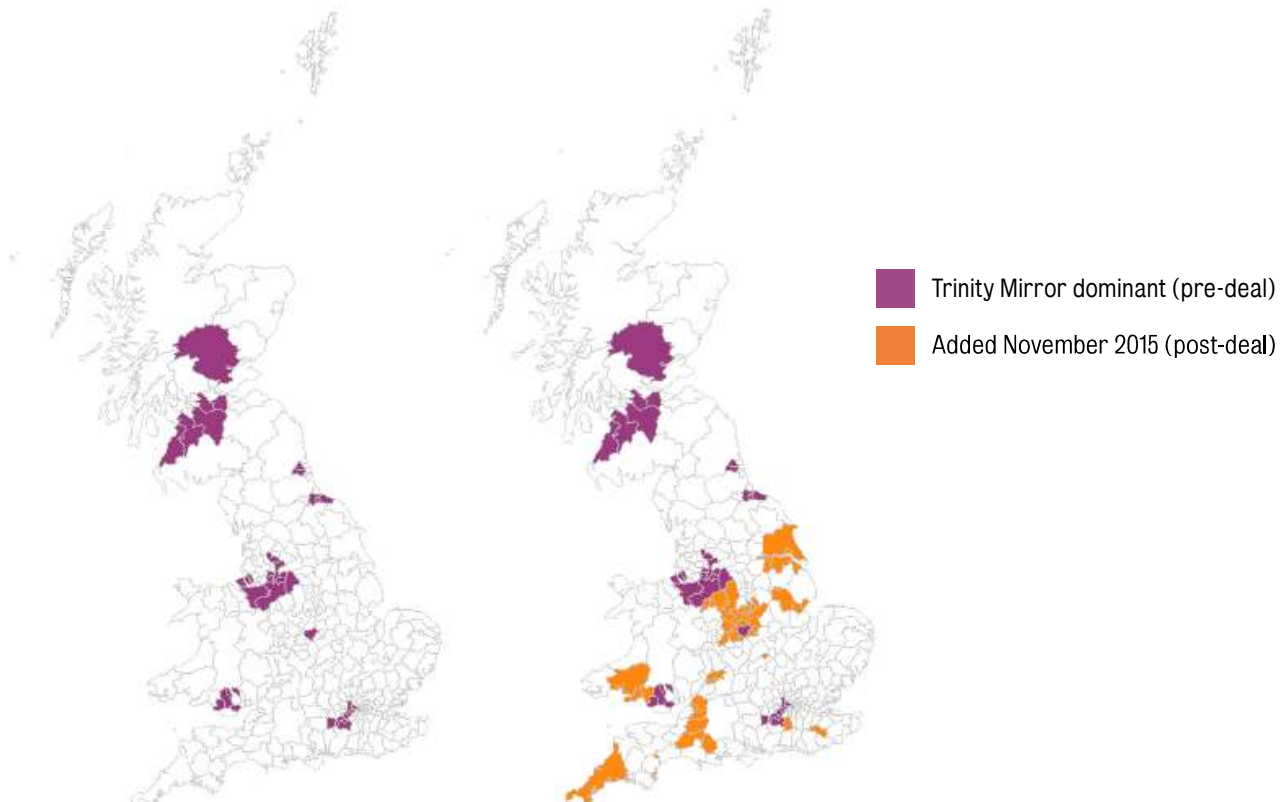
Map 10: Local Authority Districts dominated by Archant



- Archant has dominance in 24 LADs
- Its dominance is mainly concentrated in the East of England
- It has particular dominance in East Anglia and Hertfordshire, as well as in Devon



Maps 11a and 11b: LADs dominated by Trinity Mirror before and after Local World deal



- 42 LADs were dominated by Trinity Mirror before it full control of Local World¹⁵⁴
- These were centered around Liverpool/Cheshire, south Wales, south and central Scotland, and around west London
- 91 LADs were dominated by Trinity Mirror after it took full control of Local World
- It has extended its dominance from Cheshire down into Staffordshire and Leicestershire, and further in south Wales, and gained new dominance in east Yorkshire/north Lincolnshire, and Cornwall and Somerset.

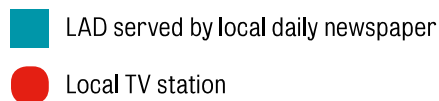
*See the Preface to this report for a note on subsequent changes to the deal.

¹⁵⁴ Not including the titles that were taken over by Iliffe Media as part of the deal

Map 12: Local daily newspapers and local TV stations



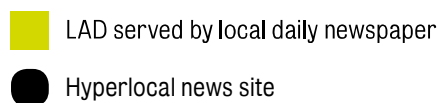
- ♦ 18 of the 20 locations (90 per cent) granted Local TV licenses by Ofcom also have a daily local newspaper.



Map 13: Hyperlocal news sites in Local Authority Districts with no local daily newspaper

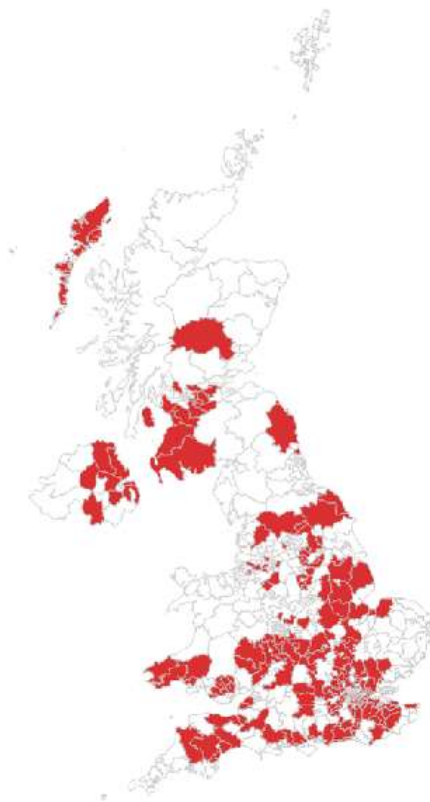


- ♦ Though there has been major growth in hyperlocal news sites in recent years, their distribution is uneven
- ♦ In areas with no daily local newspaper, while certain areas are well served (London, Devon and Dorset, West Yorkshire), other areas (Southern Scotland, Wales, Cumbria) have very few sites.¹⁵⁵



¹⁵⁵ Data from Local Web List (<http://localweblist.net/>); hyperlocal location derived from postcodes

Map 14: Parliamentary constituencies with no local daily newspaper and with five or fewer mentions in national media during the General Election campaign (30 March - 6 May)



- 206 constituencies (of 650) that have no local daily newspaper received five or fewer mentions in the national press during the UK 2015 General Election campaign
- 50 of these were not mentioned at all in the national press during the UK 2015 Election campaign. These included Lagan Valley, Altrincham and Sale West, and Merthyr Tydfil & Rhymney

 No local daily newspaper and five or fewer mentions

Local newspapers online – as much, if not greater, dominance

Available evidence on the distribution and readership of local news websites suggests that the transition of news from print to online is not decreasing the dominance of local news groups, and may be making it worse.

This study has focused chiefly on an analysis of local print newspapers, the populations they serve and their plurality. Yet given the substantial growth in online audiences for local news websites it would give an incomplete picture if local news websites were not taken into account. For that reason, we also conducted a parallel analysis of online local news sites on a sample of LADs.¹⁵⁶

Methodology

Using JICREG audience data, the number of online news outlets (and their publishers) with significant reach within a sample of randomly chosen 55 LADs was recorded, as well as monthly average audience figures for each outlet. The JICREG data appears to be submitted by the publishers themselves, so it is not clear whether absence of sites is due to the lack of self-reporting, or due to the lack of a significant web presence. As such, the results are presented here as provisional, yet based on the best available public data.

The LADs in the sample were chosen in three groups, corresponding approximately to the concentration of print publishers across LADs in Scotland, England and Wales:

- 20 LADs with monopoly coverage by local newspapers (print)
- 20 LADs with local newspaper coverage by two publishers (of which one provides over 50 per cent of newspapers by circulation)
- 15 LADs with local newspaper coverage supplied by three or more publishers.

As with print circulation, websites were rejected if they had a reach within the LAD of less than 5 per cent of adults, to eliminate large distant local sites with a small number of monthly unique browsers in a given LAD, but no local relevance in terms of newsgathering or reporting.

Dominance by publisher was calculated by measuring the proportion of monthly unique browsers within each LAD that each publisher accounted for. For example, in the London Borough of Havering, 90 per cent of total monthly unique browsers were registered on Archant sites.

¹⁵⁶ Full data available online at <http://www.localnewsmapping.uk>.

Local news websites in monopoly print LADs

Of the sample LADs where a single news group has a monopoly of local print newspapers, 80 per cent also had a single publisher accounting for all recorded monthly unique browsers for news websites (Table 5). In the remaining 20 per cent of LADs in the sample, where a second publisher provided online local news, the monopoly print publisher continued to dominate. For example, in Hertsmere in Hertfordshire, Newsquest's 100 per cent share of print circulation translates to 84 per cent of all monthly unique browsers recorded in JICREG. Archant provided the remaining 16 per cent.

Table 5: Print vs online local news provision in monopoly print LADs

LAD	Print status	Web status
Norwich	Monopoly	Monopoly
Ipswich	Monopoly	Monopoly
Chesterfield	Monopoly	Monopoly
Falkirk	Monopoly	Monopoly
Lancaster	Monopoly	Monopoly
Ribble Valley	Monopoly	Johnston Press Dominance
Wakefield	Monopoly	Monopoly
Brighton and Hove	Monopoly	Monopoly
Bolton	Monopoly	Newsquest Dominance
Craven	Monopoly	Newsquest Dominance
Watford	Monopoly	Monopoly
Hertsmere	Monopoly	Newsquest Dominance
Leicester	Monopoly	Monopoly
Rushcliffe	Monopoly	Monopoly
Rochdale	Monopoly	Monopoly
Cardiff	Monopoly	Monopoly
Stockport	Monopoly	Monopoly
East Hampshire	Monopoly	Monopoly
Cannock Chase	Monopoly	Monopoly
Cambridge	Monopoly	Monopoly

Local news websites in LADs with two print publishers

Of the sample LADs where two news groups have a duopoly of local print newspapers, none saw a new entrant to the local news market eliminate the dominant position of a single publisher. In 50 per cent there was, however, a switch in dominance (ie the dominant print publisher is not the dominant online publisher). In 20 per cent, according to JICREG data, one print publisher has an online monopoly (this may partly be explained by a failure of the data: for example in the case of Vale of Glamorgan, Tindle newspapers appear not to report online traffic).

Table 6: Print vs online news in LADs with two print publishers

LAD	Print status	Web status
Babergh	Dominance	Dominance (same)
Huntingdonshire	Dominance	Dominance (switch)
Bedford	Dominance	Dominance (switch)
East Renfrewshire	Dominance	Dominance (switch)
Leeds	Dominance	Monopoly
Luton	Dominance	Dominance (switch)
Wealden	Dominance	Dominance (same)
Christchurch	Dominance	Monopoly
Lewes	Dominance	Dominance (same)
Maldon	Dominance	Dominance (switch)
Sedgemoor	Dominance	Dominance (switch)
Worcester	Dominance	Dominance (same)
Enfield	Dominance	Monopoly
Vale of Glamorgan	Dominance	Dominance (switch)
Gloucester	Dominance	Monopoly
Boston	Dominance	Dominance (switch)
Hart	Dominance	Dominance (same)
High Peak	Dominance	Dominance (switch)
Wirral	Dominance	Dominance (same)
Dover	Dominance	Dominance (switch)

Local news websites in LADs with three or more print publishers

Of the sample LADs where three or more news groups publish local print newspapers, online local news provision was often more, rather than less, concentrated. In 20 per cent of these sample LADs, the level of dominance was reduced, and in Ashford, Kent, KM Group's (the largest publisher in the area) proportion of the online audience is approximately 47 per cent, down from its 53 per cent share of print circulation.

In 80 per cent of the sample LADs, however, online audiences were more concentrated than print circulations.

Table 7: Print vs online news provision in LADs with multiple print publishers

LAD	Publishers	Titles	Web status vs print
Ashford	Same	Same	From dominance to no dominant publisher
Chelmsford	Fewer	More	Reduced dominance
Fife	Fewer	Fewer	Monopoly
Thurrock	Fewer	Fewer	Monopoly
Mid Sussex	Fewer	More	Reduced dominance
Mid Devon	Fewer	Same	Increased dominance
Brentwood	Fewer	Same	Increased dominance
Redbridge	Fewer	Same	Increased dominance
Cherwell	Fewer	Same	Increased dominance
Hambleton	Same	More	Increased dominance
Havering	Fewer	Fewer	Increased dominance
Tandridge	Fewer	Same	Increased dominance
South Somerset	Fewer	Same	Increased dominance
Sevenoaks	Same	More	Increased dominance
Cheshire East	Fewer	Fewer	Increased dominance

The results presented in Tables 5-7 represent only a sample of LADs in the UK, and the effect of a lack of self-reporting of digital audience figures to JICREG by certain publishers is not clear. However, there is little evidence that online local news provision is alleviating the effects of concentration and lack of plurality in news provision at the level of LADs. Indeed, this preliminary evidence suggests that larger local news publishers are in a stronger position to dominate online audiences.

Case studies

There are some clear general themes about the spread and plurality of local newspapers across the UK. Dominance, for example, is clearly a significant issue. However, the picture is also complex; some areas are much better served than others. Aggregated data and a top-down view can hide nuance.

To better illustrate the situation a number of case studies are included here. Each takes a LAD that demonstrates a different aspect of local newspaper coverage in the UK, each of which represents a different theme uncovered by the analysis in this report.

The cases covered are:

- an under-served town affected by the downsizing of local news coverage
- a large under-served area affected through the closure of a local daily newspaper
- an area served by multiple titles, but by only a single publisher
- an area of pluralist and diverse local news provision.

These issues are illustrated by:

- Port Talbot: A town which saw the closure of its last dedicated local weekly paper in 2009; now served by the *South Wales Evening Post*, a newspaper based approximately 12 miles away in Swansea. A population of 37,276 now served by two journalists not based in the town.
- East Northamptonshire, Kettering and Corby – An area with a combined population of around 240,000 whose last daily local paper switched to a weekly in May 2012. All three LADs are served by a single weekly title.
- Rochdale – an LAD served by four newspapers, including a daily – the *Manchester Evening News* – all owned by one publisher, Trinity Mirror and published from the same site.
- Aberdeenshire – a large and well-populated area covering much of North East Scotland surrounding Aberdeen, served by 15 local papers produced by four different publishers, and covered in some depth by the Aberdeen-based daily paper, DC Thompson's *Press and Journal*.

Case study 1: Port Talbot – a community without dedicated local news coverage

The town of Port Talbot has a population of 37,276 and the Aberavon Parliamentary constituency 66,133 (2011 Census).

18.6 per cent of residents of Neath-Port Talbot are over 65, higher than the national average, and 41 per cent have never accessed the internet (Welsh Government: Government Social Research, 2011).

The only local newspaper covering the town is the *South Wales Evening Post* (Trinity Mirror) - a Swansea-based daily paper with a Port Talbot edition.

The *Port Talbot Guardian* and *Neath Guardian* were closed by Trinity Mirror in 2009.

Neither Port Talbot, nor the neighbouring town of Neath, have their own dedicated local newspaper, but rely on local editions of the *South Wales Evening Post* and a weekly insert called the *Neath Port Talbot Courier*. The *Post* was previously owned by Local World before Trinity Mirror took full control in 2015.

In 2015 Rachel Howells completed an in-depth four-year study of news provision in Port Talbot, to understand the impact of the closure of the local paper, particularly on local democracy. The research was qualitative, quantitative and based on extensive interviews and research. Amongst other findings the study concluded:

- The 85-year-old *Port Talbot Guardian* was ‘the weekly bible’, ‘If you wanted to know anything [about Port Talbot] you’d look in the *Guardian*’.
- In the 1960s, up to 11 reporters worked across five newspapers, all of whom had offices in Port Talbot; by the 2010s, two reporters covered Neath and Port Talbot, based ten miles away in Swansea.
- The town has left behind a period of relatively rich and plural local coverage to being serviced by just The *South Wales Evening Post*, which only provides a handful of Neath/Port Talbot stories in its local edition.
- The gradual withdrawal of journalists from the area marks a decline in frequent on-the-ground, first-hand, local public interest coverage and an increase in the use of passive, pre-packaged, managed news sources like press releases.
- Word of mouth, social networks and even graffiti were listed as local residents’ sources of local information in the town which lost its newspaper.
- Frustration, alienation and anger generated by lack of knowledge and lack of voice about a particular local issue – the temporary closure of the M4 exit – led to discussion of direct action and rioting in focus groups conducted as part of the research.

Port Talbot is a prime example of a community that still – technically – receives local news coverage from a daily newspaper published by a large and well-resourced publishing group. In practice, however, the volume and quality of local coverage is far from what is needed for citizens to stay fully informed about the important issues facing them and their community. It is indicative of several observed trends in local news provision – substantial reductions in staff numbers, the physical removal of journalists from the area they cover, and the apparent maintenance of a reduced sub-edition to capitalise on the local advertising market.

Case study 2: Kettering, Corby and East Northamptonshire – a poorly-served region

Three adjacent LADs in eastern Northamptonshire account for approximately 240,000 people.

No daily local paper; all three served by a single weekly Johnston Press paper, the *Northants Telegraph*.

Northants Telegraph went from daily to weekly publication in 2012.

The eastern part of Northamptonshire made up of the three LADs Corby, Kettering and East Northamptonshire is served by a single weekly newspaper, the *Northants Telegraph*. Johnston Press is the monopoly local news provider in this area.

The *Northants Telegraph* was, until 2012, a daily newspaper published in three separate editions, the *Corby Telegraph*, the *Kettering Telegraph*, and the *Wellingborough & Rushden Evening Telegraph*. These were merged into a single title that switched to weekly publication.

Registered newspaper circulation in each of the LADs is low. A total of 5,337 newspapers are sold in Kettering, which has a population of over 77,000 adults. In Corby and East Northamptonshire, the figures are 3,221 (50,179 adults) and 3,268 (80,767 adults). The audiences for the *Northants Telegraph* website are, understandably, larger, but are not accessed by a majority of citizens. In East Northamptonshire less than a quarter – 23 per cent - of adults access the *Telegraph* site in an average month.¹⁵⁷ In Corby the proportion is higher, at 36 per cent, and in Kettering 39 per cent of adults access the website of the only local newspaper on a monthly basis.

According to Local Web List, there are two hyperlocal news sites in this area: a Kettering based site, *Kettering Online News*;¹⁵⁸ and another based in the East Northamptonshire town of Rushden, *Rushden Town Voice*.¹⁵⁹ Neither site continues to publish news regularly; at the time of writing (December 2015), *Rushden Town Voice* had not published any articles in three months, a period in which *Kettering Online News* had published one article, illustrating the pressures facing hyperlocal news sites even in areas in which local newspaper coverage is sparse.

¹⁵⁷ All website audience data obtained from JICREG.

¹⁵⁸ <https://ketteringonlinenews.wordpress.com/>

¹⁵⁹ <http://rushden.townvoice.co.uk/>

Case study 3: Rochdale – multiple newspapers, single publisher

Part of Greater Manchester – LAD containing over 200,000 people. The main urban centre in the LAD is Rochdale itself.

Contains two parliamentary constituencies: Rochdale, and Heywood and Middleton. Combined, these constituencies received just three mentions in national media coverage of the 2015 General Election campaign.

Covered by four local papers, all owned by Trinity Mirror.

Rochdale is covered by four local papers, all published by Trinity Mirror. This includes daily coverage by the *Manchester Evening News*, though Rochdale accounts for under 5 per cent of all copy sales of that title, and only for the Thursday and Friday editions, which combine paid copies with free pickup copies.

Of the other available local papers, the *Heywood Advertiser* and the *Middleton & North Manchester Guardian* are weekly titles, while the *Rochdale Observer* publishes twice a week. None of these titles have a stand-alone website, and are instead covered on special pages of the *Manchester Evening News* site.¹⁶⁰ Since 2013, all three titles have been published from the offices of the *Manchester Evening News* in Chadderton, Oldham.

Rochdale is also served by two online news sites, *Rochdale Online*¹⁶¹ and *Littleborough Local*.¹⁶² *Rochdale Online* has a relatively high output of daily news, publishing around 20-25 news articles (in all categories, including sport) each day, while *Littleborough Local*, focusing on the town of Littleborough, has much lower output, publishing around 10 articles per week.

Rochdale is covered by the Manchester local TV channel, That's Manchester, which commenced broadcasting in May 2015,¹⁶³ although the licensee successfully requested a reduction in its news and current affairs obligations in October 2015.¹⁶⁴

¹⁶⁰ <http://www.manchestereveningnews.co.uk/all-about/heywood>; <http://www.manchestereveningnews.co.uk/all-about/middleton>; <http://www.manchestereveningnews.co.uk/all-about/rochdale>.

¹⁶¹ <http://www.rochdaleonline.co.uk/>

¹⁶² <http://www.littleboroughlocal.co.uk/>

¹⁶³ A516digital.com, 'New Manchester Local TV channel has launched, 31 May 2015, <http://www.a516digital.com/2015/05/local-channel-thats-manchester-has.html> (accessed 10th December 2015).

¹⁶⁴ Ofcom, 'Local TV decision: That's Manchester change request', 2 November 2015, http://licensing.ofcom.org.uk/binaries/tv/local-tv/manchester/BLC_Decision_Statement_-_Manchester_November_2015.pdf (accessed 10 December 2015).

Case study 4: Aberdeenshire – diverse local news provision

Sixth most populous LAD in Scotland, with over 260,000 residents.

Four publishers – DC Thompson, Johnston Press, Scottish Provincial Press, and W. Peters & Son – publish 15 local newspapers with significant circulation and penetration in the area.

In contrast to Neath Port Talbot, Kettering and Corby, Aberdeenshire (the area surrounding Aberdeen, stretching from Moray in the West to Angus in the South) is comparatively well served by local newspapers, with four different publishers providing 15 different titles, two of which – the *Evening Express* and the *Press & Journal* – are daily titles:

- *Aberdeen Citizen* – DC Thompson
- *Aberdeen Evening Express* – DC Thompson
- *Press & Journal* – DC Thompson
- *Ellon Times* – Johnston Press
- *Buchan Observer* – Johnston Press
- *Inverurie Herald* – Johnston Press
- *Deeside Piper* – Johnston Press
- *Donside Piper* – Johnston Press
- *Mearns Leader* – Johnston Press
- *Kincardine Observer* – Johnston Press
- *Banffshire Journal* – Scottish Provincial Press Ltd
- *Huntly Express* – Scottish Provincial Press Ltd
- *Ellon Advertiser* – W. Peters & Son Ltd
- *Turriff Advertiser* – W. Peters & Son Ltd
- *Inverurie Advertiser* – W. Peters & Son Ltd

DC Thompson is the dominant publisher, with over 60 per cent of local newspaper circulation in the area. However, the titles published by DC Thompson are Aberdeen-based – the *Aberdeen Citizen*, *Aberdeen Evening Express* and the *Press & Journal*. Johnstone Press publishes seven titles in the region, grouped under three stables. *The Deeside Piper* and *Donside Piper* are sister titles, as are the *Mearns Leader* and *Kincardineshire Observer*. W. Peters & Son Ltd publish three sister titles, the *Ellon Advertiser*, the *Turriff Advertiser* and the *Inverurie Advertiser*.

Conclusion

Although the exact number of local newspaper closures is disputed, partly due to the shortcomings of the data available, few people dispute that print newspapers across the UK are closing, or that the previous decade has not been a period of difficult transition for the local newspaper industry. Given the nature of the transition and the continued decline in print circulations and revenues, the more surprising finding has been that fewer newspapers have closed in the last five years than was expected. Predictions that 50 per cent would close proved to have been unfounded when the best estimates for the figure are closer to 15 per cent.¹⁶⁵

While this may, on the face of it, seem like a positive finding and one that contradicts concerns about an emerging democratic deficit, it also gives only a partial picture of the trends affecting local news provision in the UK.

Fewer newspapers may have been closed than expected, but many of those remaining have been hollowed out. Editorial staffs have been reduced at almost all the major news groups. Few staff photographers remain. Sub-editing roles have been centralised. Certain positions have been outsourced abroad. Town centre offices have been closed, and local news is often now gathered and written a considerable distance from the covered area (raising the question of what constitutes 'local' news coverage).

The plurality of news provision is also being eroded significantly. In 1947 the Royal Commission on the Press was set up partly because of concerns about the concentration of ownership. At this time four news groups accounted for approximately one-third of the daily papers across the country (Jay and Bundock, 1947). In 2015 four owners controlled 73 per cent of titles in the UK.

It is also significant that these publishers are often dominant in the areas they serve – in many cases they have monopoly control. 85 per cent of local authority districts in Scotland, Wales and England are covered by just one or two news providers. One hundred and sixty three districts are served by a single publisher.

When there is such dominance, it can be more sensible from a financial perspective for publishers to keep a title alive while it continues to make money. Since there is no comparable competitor then the company can, should it wish, reduce the costs of production as much as possible. Evidence suggests this is what some of the large newspaper groups have done. Such a strategy becomes even more appealing if other organisations – such as search and social networks – are competing for advertising revenue (as Google and Facebook are).

¹⁶⁵ Shackleton, E., 'Map of UK's local newspapers and websites reveals London news gap', *Press Gazette*, 4 June 2015, <http://www.pressgazette.co.uk/map-uks-local-newspapers-and-websites-reveals-london-news-gap> (accessed 10th December 2015).

Yet, though this may make commercial sense, it can be damaging from a democratic perspective. It can mean that there are areas, like Neath Port Talbot, that are – technically - covered by a local daily paper but whose volume of news provision has been dramatically reduced over the space of several years. It can mean that the amount of local public interest and investigative journalism is reduced as editorial staffs are cut and the pressures on fewer journalists to produce more stories increases. It can also lower the number of editorial voices to, effectively, one – with serious implications for the plurality of views on which the foundation of healthy democracy rests.

Local news groups point to the increase in readership of local online news sites as evidence that the decline in print newspapers is offset, or reversed, by a rise in digital news consumption. This increased readership, particularly in the last few years, has been dramatic, and means that – based on numbers alone – local news sites may be reaching more people than local print newspapers previously did. However, from a democratic perspective there are three clear differences between the digital news sites and their print predecessors:

- The increase in digital readership has not been accompanied by an increase in the on-the-ground reporting of local news. There are not more journalists covering local councils, courts, schools or hospitals. In fact there are indications that far fewer journalists are doing this. Consequently there has been no increase in the (already diminished) public interest journalism reaching these increased readerships.
- The increase has not reversed the centralisation and outsourcing of news production.
- The increase does not address the question of dominance. More people accessing fewer sources of news (and fewer viewpoints) is not a solution to the problem of reduced plurality.

These three issues go to the heart of claims about a growing democratic deficit as a consequence of a decline in the provision and diversity of local news: the lack of local reporting; the disappearance of local papers from the communities they serve; and the lack of plurality of local news provision.

On the first and second of these issues, though there is increasing evidence of insufficiency, it is not yet comprehensive or detailed enough. There is a pressing need for research on which local councils are, or are not, being regularly reported on by journalists. Nor is there comprehensive evidence of the extent to which there continues to be on-the-ground local reporting that leads to original local published journalism, as opposed to newspapers put together by reduced teams or individual journalists ‘skimming online content’ in the words of former Local World Chief Executive David Montgomery. An additional concern is raised by the substantial consolidation of local newspaper ownership and the move to a digital news production model – the extent to which online local news provision across the country consists of primary reporting on local issues and events, as opposed to reports based on press releases and statements by local public bodies and commercial organisations, or duplicated content across multiple titles, with little or no local relevance.

Assessing the degree to which there is an emerging democratic deficit would be helped significantly by further research on each of these three questions.

This report has sought to address, on the basis of the best publicly-available data, the issue of dominance. It has shown that consolidation within the local newspaper industry has led to unprecedented levels of concentration of ownership and the reduction of competing sources of local news in large sections of the country, including increasing numbers of local news monopolies.

The findings of the report raise clear public policy implications, not least in the wake of the Local World-Trinity Mirror deal in 2015. Concentration of ownership, already at unprecedented levels prior to the deal, now sits at almost three-quarters of all titles owned by four companies. The deal means that 91 local news markets are now dominated by Trinity Mirror, and in many it is the monopoly local newspaper provider.

Regional and local television news is provided across the country by the BBC and Channel 3 franchise holders, though they lack the capacity to provide continuous coverage at the community level. Commercial local radio news is almost entirely provided by one company – Sky News Radio – while the BBC again provides public service radio as well as regional news coverage online. It is difficult to argue that this constitutes a healthy plurality of professionally produced news targeted at local communities. Integrated research into the volume and spread of broadcasters' news coverage of local communities in the UK is necessary to understand the extent of the problem.

The advent of local television – disregarding the structural and contextual issues that continue to dog its implementation and execution – has not solved this problem. 18 out of 20 local TV stations have been launched in areas that were already served by a daily local newspaper – in the context of local newspaper coverage, these were already relatively well-served areas. Rural communities traditionally underserved by local newspapers have received little or no benefit.

In one example, local television illustrates both concentration of ownership and the questionable viability of local TV as a solution to local news plurality. The local TV franchise for Norwich, Mustard TV, was bought by Archant in 2012. Norwich already has two local daily newspapers, the *Eastern Daily Press* and the *Norwich Evening News* – both owned by Archant. Indeed, as Map 10 shows (page 54), Archant is the dominant publisher in most LADs in East Anglia. Local television has therefore had no effect on local news plurality in that region, other than adding another Archant news source. Furthermore, in October 2015 the Chief Executive of Archant announced that the local TV station was suffering losses so great that further subsidies from the BBC would be needed, and Ofcom's rules on local programming, news and current affairs provision would need to be relaxed for the venture to succeed.¹⁶⁶

The evidence gathered for this study shows that the majority of citizens in the UK are not being served by a plurality of local news sources, and that consolidation and concentration continue to characterize the local newspaper industry. Other data referenced in the study indicates that reporting of local public affairs is suffering as a consequence of editorial cuts and centralisation of production. Yet there appears to be little or no appetite for public policy research to understand the issues or explore interventions to address them. This report shows the need for a renewed focus of attention on this subject.

¹⁶⁶ Greenslade, R., 'BBC and Ofcom asked to help Norwich TV station cut the Mustard', *Guardian*, 12 October 2015, <http://www.theguardian.com/media/2015/oct/12/bbc-ofcom-help-norwich-tv-station-mustard>.

Policy implications

1. The existing plurality framework is neither promoting nor protecting plurality of news media ownership in multiple local areas across the UK. The government should consider a major upheaval of the existing media plurality framework

This study has found that in 165 LADs in England, Scotland and Wales a single commercial news publisher has a monopoly. These monopolies are not adequately offset by news provision by the BBC or ITV since neither provide local news at the LAD level. The BBC has one regional service for each seven LADs, and ITV one for every 35 LADs in England and Wales.

Existing competition policy does not address issues of media plurality such as this. The Enterprise Act (2002) for example, only allows for action in the event of a merger or acquisition. Yet in many of the 165 LADs where a single commercial news provider has a monopoly it has gained the monopoly organically over time rather than through merger or acquisition. Even where a merger/acquisition has taken place, which has a pronounced impact on the plurality of local news, no action has been taken. In October 2015 Trinity Mirror acquired the remainder of Local World (having acquired a 20 per cent stake in 2012). As a consequence of the takeover Trinity Mirror substantially increased the number of areas in which it is a monopoly provider of local news. As yet there has been no indication that the Secretary of State believes this raises public interest considerations.

Neither the Enterprise Act, nor other competition legislation, is intended to identify or address issues of media plurality at a local level. Competition policy is, by its nature, concerned with the welfare of the consumer, as opposed to being concerned with the welfare of the citizen.

There is therefore a significant gap in the current legislative framework. A gap that was identified by the House of Lords Select Committee on Communications in its 2014 report on media plurality. The report put forward 'the need for a media plurality policy', as distinct from a competition policy.¹⁶⁷ As the report said, 'Competition and plurality policy are clearly separate but parallel policies'. Yet there is currently 'no definition of media plurality in statute', according to the Department for Culture, Media and Sport.¹⁶⁸ Without such a definition, and one that recognises the democratic as well as economic rationale for plurality, it is hard to see how any regulator or other authority could evaluate whether there is 'sufficient plurality' of media in a local area.

¹⁶⁷ House of Lords Select Committee on Communications, 'Media Plurality', 4 February 2014, <http://www.publications.parliament.uk/pa/ld201314/ldselect/ldcomm/120/120.pdf>.

¹⁶⁸ Department for Culture, Media and Sport, 'Media Ownership and Plurality Consultation', July 2013, p4, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/225790/Media_Plurality_Consultation_2013.pdf (accessed 9 February 2016).

This study provides further evidence of the need for a media plurality policy that takes account of the needs of the citizen as well as the needs of the consumer. A new statutory framework could set out a definition of media plurality, and could promote and protect plurality for the benefit of the citizen, giving clear guidance to inform future policy.

2. While there is evidence to support intervention in local news, there is not yet enough detailed and local evidence to target specific interventions, such as the BBC's proposal to employ 100 new local reporters.

The evidence is clear that the number of editorial staff at the dominant local news groups has fallen considerably over the last decade. There is also compelling evidence from specific areas that shows journalists are not regularly attending and reporting on local councils and other local authorities. This, combined with the evidence of monopoly and dominant news provision in multiple local area districts, strongly supports the rationale for intervention to prevent the emergence of a democratic deficit.

However, there remains a lack of detailed local evidence about the reporting of individual local authorities across the UK. Without such detailed local evidence it is hard to target specific interventions, such as the BBC's proposal to employ 100 new local reporters to provide 'free' reports on councils, courts and other local authorities.

Further research is necessary, by the BBC or by others, in order to better inform the nature and extent of intervention in local news provision in order to prevent the emergence of a democratic deficit.

3. Subsidies currently given to local media – which run into the hundreds of millions – are not targeted at promoting plurality, entrepreneurialism or at addressing the democratic deficit.

Zero-rated VAT and statutory notices are the two most significant subsidies provided by the State to the local press. Neither are available for emerging hyperlocal news services or their equivalents. Zero-rated VAT only applies to print newspapers. The government policy towards Local Television is only directed at 20 local TV stations, all of which are broadcasting in areas where there are already daily local newspapers (some of which are owned by the same organisation that runs the local TV service). It remains in doubt whether even these local TV services will be sustainable when the government subsidy ends in 2017.

Despite evidence of the emergence of new entrepreneurial local news services providing public interest news, and evidence of the economic precariousness of these services, there is no public policy to support these services – direct or indirect. As Steven Barnett and Judith Townend wrote in 2015, 'Policy thinking is therefore lagging well behind real-world media activity, and currently takes little account of emerging forms of local and community online initiatives which can potentially achieve greater success in fulfilling those democratic roles'.¹⁶⁹ Ideas have been put forward to promote positive plurality, including options for local partnerships, charitable status for news

¹⁶⁹ Barnett, S., Townend, J., 'Plurality, Policy and the Local: Can hyperlocals fill the gap?', *Journalism Practice*, 2015, 9 (3).

organisations, and a UK equivalent of the Knight News Challenge, but there is no indication that any of these have yet been seriously considered.¹⁷⁰

Subsidies currently provided to local media should be reviewed and reformed so that they support the provision of local public interest news, whoever provides it. New options should be considered to promote local plurality, innovation, entrepreneurialism and sustainability in local news provision.

4. There is an urgent need for further research to establish the nature and extent of local news provision and inform potential policy interventions.

There are significant gaps in our knowledge of provision of local news that allow people to make contradictory claims about, for example, the emergence of a democratic deficit. We do not know, for example, which local councils or local courts are attended, and reported on, by a local journalist. We do not have content analysis across multiple titles to show what public interest journalism is being published and what is not. Our evidence of the relationship between public relations and local journalism – ‘churnalism’ for example – dates from before the 2008 financial crisis.

In 2009 Ofcom published a report on ‘Regional and Local Media’. The report captured the range of media available at a local level in 2009 across different platforms. It highlighted the importance of local media to the UK public, and contemporary concerns about a potential democratic deficit due to the decline in local newspapers. It balanced this with the perspectives from the industry arguing that though the role of local newspapers may be changing, this should not be confused with declining quality. The problems identified were, however enough for Ofcom to conclude that:

‘The evidence, in this and in previous sections, suggests that local and regional media are critical to informed and active citizenship, while consumers value a variety of local content for their personal interest. Despite this continued interest and recognition of the importance of local issues, the combination of structural and cyclical pressures suggests that some form of action may be required to help the sector manage these challenges.’

Since 2009 the number of editorial job losses in the local press has increased significantly, more titles have closed, and local news have admitted the difficulty of providing the breadth and depth of news reporting they were previously able to provide.

However, the picture is very different across the country. As shown by the mapping in this study, there are some areas that appear well served by local news and others that appear poorly served. Moreover, this mapping does not indicate the level of on-the-ground reporting being done, or the type of content being published and with what regularity.

Without such evidence it is difficult to decide the extent of the problem, its nature, or the urgency of any need to explore possible interventions. Policymakers are less able to assess whether there is a need for further investigation, or to formulate targeted solutions.

¹⁷⁰ Townend, J., ‘Hyperlocal Media and the News Marketplace’, in Barnett, S., Townend, J., *Media Power and Plurality*, 2015, Basingstoke: Palgrave Macmillan; Moore, M., *Addressing the Democratic Deficit in Local News through Positive Plurality*, London: Media Standards Trust, <http://mediastandardstrust.org/wp-content/uploads/2014/10/Positive-Plurality-policy-paper-9-10-14.pdf>.

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